

# ROMANIAN CHEESE MARKET

a DEMO sector brief by  
FRD Center

CONSUMPTION  
IMPORTS  
IMPORTERS  
PRICES  
PRODUCT LAUNCHES  
RETAIL



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- product presentation and assessment of interest from clients / partners
- pre-M&A business support and research
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*Sources consulted for this report: business mass media, the companies, official sources*

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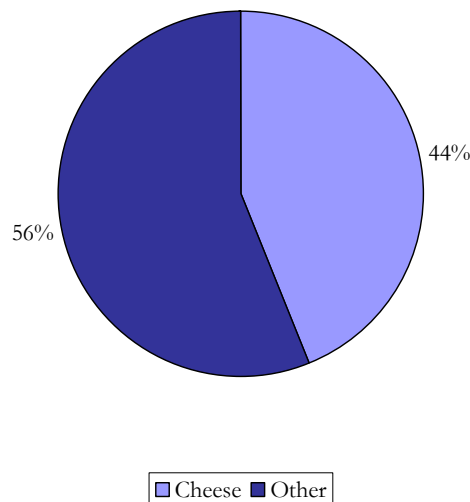
## 1. CONSUMPTION

The consumption of industrialised cheese in Romania is estimated at approximately 80,000 - 90,000 tonnes per year and at some 900 - 950 million EUR (including melted cheese and cheese creams). This represents an average annual consumption of approximately 4 - 4.5 kilograms per capita.

The consumption of melted cheese and cheese creams represents approximately 16 - 18% in the total cheese consumption in Romania.

In the modern retail in Romania, the cheese sales represent 16% in the total sales of dairy products in terms of volume and of 44% in terms of value.

Sales of dairy products in modern retail in Romania, by value

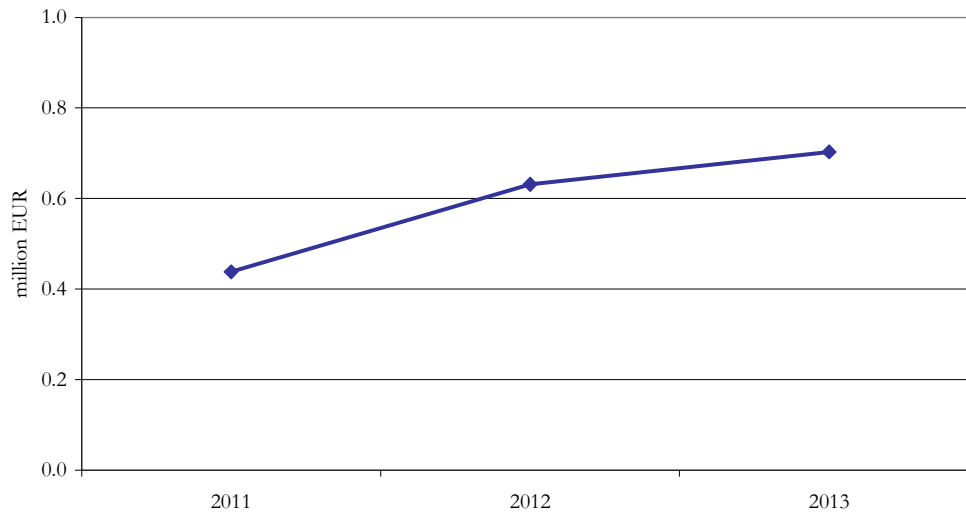


It is estimated that the consumption of cheese in Romania will record an increase of approximately 2% in volume, in 2015 compared to 2014.

The alternative at the industrialised market - the homemade cheese and the cheese purchased from markets or directly from farmers - is expected to continue to play an important role, especially in the rural areas and small towns in Romania.

In the recent years, an increasing preference of the Romanian consumer towards gourmet cheeses was observed, blue cheeses as well as goat cheeses. For example, the company **Super Lactis** specialised in production and import-distribution of goat cheese specialities, has recorded in 2013 an increase of sales of 11% compared to 2012, while in 2012 vs. 2011 the growth was of 44%.

Super Lactis - sales dynamics



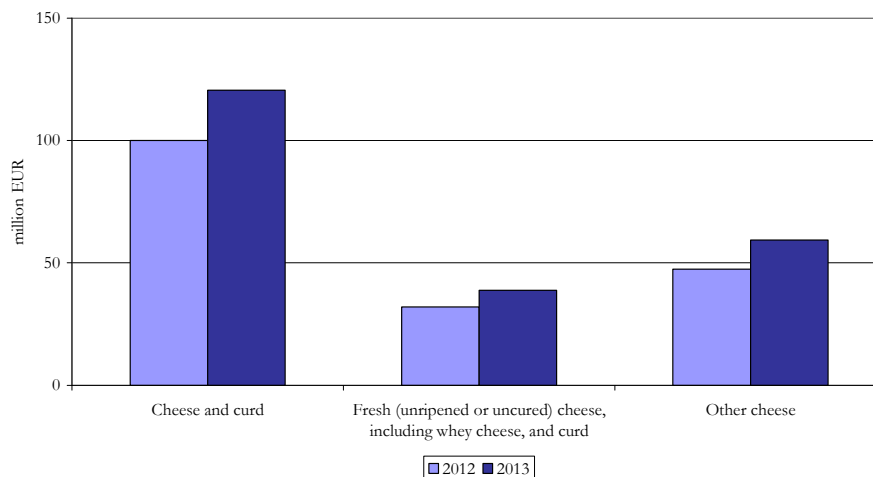
## 2. IMPORTS

The imports of cheese and curd in Romania have recorded over 120 million EUR in 2013, up by approximately 21% compared to 2012.

The Romanian imports of fresh (unripened or uncured) cheese, including whey cheese, and curd have registered a y/y increase of some 22% in 2013, reaching almost 39 million EUR.

The Romanian imports of other cheese (cheese for processing, Emmentaler, Gruyère, Sbrinz, Bergkäse, Appenzell, Fromage fribourgeois, Vacherin Mont d'Or and Tête de Moine, Cheddar, Edam, Tilsit, Kashkaval, Feta, Kefalo-Tyri, Finlandia, Jarlsberg) have recorded almost 60 million EUR in 2013, up by over 25% compared to 2012.

Dynamics of cheese imports in Romania

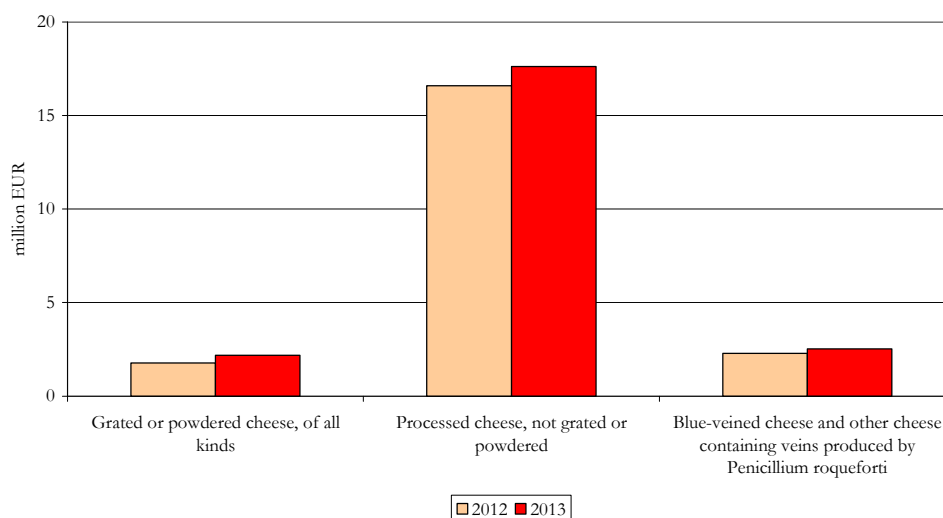


The imports of grated or powdered cheese, of all kinds have exceeded 2 million EUR in Romania in 2013, up by approximately 22% compared to 2012

The imports of processed cheese, not grated or powdered in Romania have reached almost 18 million EUR in 2013, up by over 6% compared to the previous year.

The Romanian imports of blue-veined cheese and other cheese containing veins produced by *Penicillium roqueforti* have registered some 2.5 million EUR in 2013, up by approximately 11% compared to 2012.

Dynamics of premium cheese imports in Romania



### 3. IMPORTERS

Some of the most important importer-distributors of cheese in Romania are: Nordic Import Export Co, Agroalim Distribution, Camara Distribution Service, Dion Distribution, Serpico Trading and Whiteland Import Export

Established in 1994, **Nordic Import Export Co** imports and distributes HoReCa and retail products (cheese, sausages, fish products, pasta, olive oil, vinegar, canned food, tea, coffee, wine, desserts etc) and specific products for bakery and pastry units (natural flavours, creams, jellies, fruit pulp, premixes, fruit purees, toppings etc). The company imports cheese produced by Soignon (France), Arla (Denmark), Zanetti (Italy), Galbani (Italy) etc and distributes them in the entire country. In 2013, Nordic Import Export Co has recorded a net turnover of over 37 million EUR, up by 4% compared to 2012. It has some 200 employees.

**Agroalim Distribution** was set up in 1991. Since 2009, the company has been part of the US Group Smithfield. Agroalim imports and distributes cheese, meat and meat products, frozen fish, frozen vegetables and fruits, canned food, oils, sauces, spices etc.

The company imports cheese produced by Uhrenholt (Denmark), Meggle (Germany), FrieslandCampina (the Netherlands) etc. Some of the company's clients are: Auchan, Kaufland, Carrefour, Mega Image, Billa, Howard Johnson Hotel, JW Marriott Hotel, Hard Rock Café etc. Agroalim Distribution has registered a net turnover of over 26 million EUR and approximately 220 employees in 2013.

Set up in 2002, **Camara Distribution Service** imports food from France: cheese, sausages, delicatessen (foie gras, rillettes pur canard, foie de canard, confit de canard, canard a l'orange etc), chocolate, desserts, fish and seafood, spices, fruits, vegetables etc. Some brands of cheese imported by the company are: Mont d'or, Chabichou du Poitou, Échiré, Comté etc. The company's clients include gourmet restaurants, such as: Balthazar and the French Bakery chain. Camara Distribution Service has recorded sales of 0.4 million EUR in 2013.

Set up in 1994, **Dion Distribution** imports and distributes cheese, sausages, canned food, olives, wine etc. Dion imports its products from Spain, France, Germany etc. One of the company's imported brands of cheese is Quesos La Vasco Navarra (Spain). Some of its clients are: Metro, Selgros, Carrefour, Cora etc. The company has recorded sales of 0.4 million EUR in 2013.

Established in 1993, **Serpico Trading** imports and distributes dairy products, canned food, ready-made food, bakery products, ice cream, sauces, frozen vegetables etc. Some of its foreign suppliers are: Bonduelle, Filippo Berio, Siblou, Adriana, Maseko, La Bianca, Vici, Defish, Jealsa Rianxeira, Siblou etc. Serpico Trading distributes its products in the entire country, its customers including retail and HoReCa players. The company has recorded a net turnover of over 6.5 million EUR in 2013, up by approximately 23% compared to 2012. It has some 40 employees.

Established in 1993, **Whiteland Import Export** imports and distributes dairy products, canned food, condiments, mustard, jams etc. Some brands distributed by the company are: Hochland, Orkla Foods, Meggle, Don Gustosso, Raureni, Vici, Mission, d'aucy, Podravka etc. In 2013, Whiteland Import Export has recorded a net turnover of 96 million EUR, up by 8% compared to 2012. The company has approximately 400 employees.

#### 4. PRICES

Some examples of prices of gourmet cheese available in Romania are:

- Gourmet French Cheese, Vacherin du haut-Doubs - Mont d'Or, 800 g: 20 EUR
- Gourmet French Cheese, Comté, 500 g: 15.5 EUR
- Gourmet French Cheese, Poulligny Saint-Pierre, 250 g: 11.5 EUR
- Sweet Butter, Échiré, 250 g: 7.5 EUR

- Gourmet French Goat Cheese, Chabichou du Poitou, 2 pieces of 150 g each: 14 EUR
- Danish Blue Cheese, Hamlet Blue, Dana Blue, 300 g: 9.3 EUR

## 5. PRODUCT LAUNCHES

Some examples of recent cheese launchings on the Romania market are:

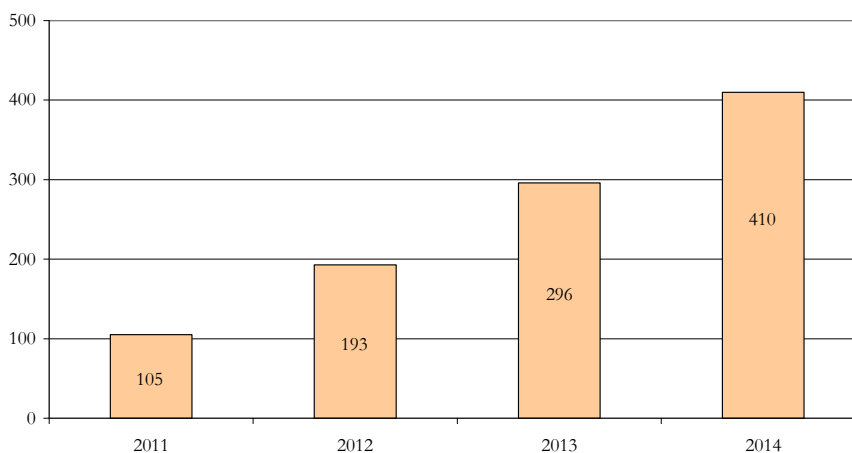
- Hochland, the leader on the Romanian cheese market, has launched in September 2014 the range “Delicii Calde“, which includes all the cheese in its portfolio, specially manufactured to be hot cooked. The range includes also two new cheese varieties: Bruchetta Pizza and Bruschetta Rustica, available in boxes of 175 grams. Hochland has two production units in Romania.
- Delaco, part of the Bongrain Group, has re-launched in September 2014 its range of cheese cream “Crema de Branza”, with new recipe and packaging. Delaco has own brands (Delaco, Milkana, Coeur de Lion, Caprice des Dieux) and distributes the brands Zott, Bergader, Joya, Arla and Lurpak.

## 6. RETAIL

The two networks of modern retail, with a focus on middle range and premium products in Romania, Mega Image and Billa, have dedicated areas for dairy products. They offer the entire variety of cheeses, from cheese creams and fresh cheeses to processed and blue cheeses.

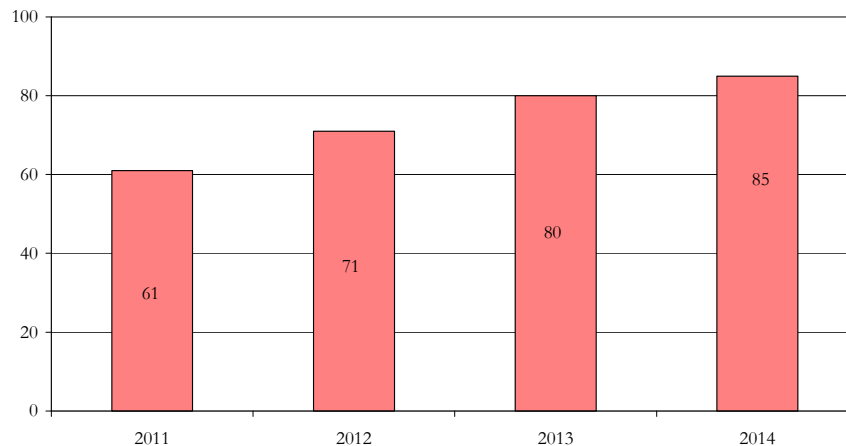
**Mega Image**, part of the Belgian Group Delhaize, has 411 stores in Romania, out of which 200 Mega Image stores, 209 Shop&Go stores, one AB Cool Food store and one Mega Drive store. Mega Image has the biggest network of supermarkets on the domestic market and it is focused on premium and middle range products. The latest Mega Image store has been launched in February 2015, in Bucharest. Mega Image has registered a net turnover of 530 million EUR in 2013, up by some 34% compared to 2012.

Mega Image - number of stores



Billa, part of Rewe International Group, has 85 stores in Romania. The first Billa store on the domestic market has been launched in 1999. The Billa stores have surfaces of 250 - 2,400 sqm. The range of products in the Billa stores is diversified and includes: dairy products, meat and meat products, delicatessen, bakery products, fruits and vegetables, sweets, beverages, wines, non-food products etc. Billa Romania has registered a net turnover of approximately 308 million EUR in 2013, up by over 8% compared to 2012.

Billa - number of stores



In Romania, there are also specialised stores that sell exclusively gourmet food. For example, the company **Le Manoir** owns the Comtesse du Barry stores, the Wine & Caviar Bar, La Boucherie Francaise store and Le Bistrot Français. Le Manoir imports and sells cheese, sausages, foie gras, nectars, jams, caviar specialties, sweets, chocolate, spices, tea, wines etc. Some examples of brands imported by the company are: Jean d'Alos, Jean Yves Bordier, Comtesse du Barry, Alain Milliat, Carrasco Guijuelo, Caviar Kaspia, Maxim's de Paris, Michel Cluizel, Terre Exotique, Kusmi Tea or Mademoiselle de Margaux. Le Manoir has recorded a net turnover of over 3 million EUR in 2013, up by almost 9% compared to 2012.

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