

Dairy Products and Alternatives in Romania

September 2023

Table of Contents

EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2018-2023

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023

Table 5 - Penetration of Private Label by Category: % Value 2018-2023

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value growth in baby food supported by higher costs, whereas volume remains flat due to competition from breast feeding

Milk formula remains in-demand, albeit challenged by “free milk” programmes

Modern retail remains strong for baby food

PROSPECTS AND OPPORTUNITIES

Ongoing overall demand expected, with indications for a higher populace

Retail trends and medical advice will drive developments

The big global names maintain their leading status quo

CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2018-2023

Table 10 - Sales of Baby Food by Category: Value 2018-2023

Table 11 - Sales of Baby Food by Category: % Volume Growth 2018-2023

Table 12 - Sales of Baby Food by Category: % Value Growth 2018-2023

Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2018-2023

Table 14 - NBO Company Shares of Baby Food: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby Food: % Value 2020-2023

Table 16 - Distribution of Baby Food by Format: % Value 2018-2023

Table 17 - Forecast Sales of Baby Food by Category: Volume 2023-2028

Table 18 - Forecast Sales of Baby Food by Category: Value 2023-2028

Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028

Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

Butter and Spreads in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Butter and spreads value growth supported by high unit prices, but price-sensitive consumers buy lower volumes
Suspected unwarranted price hikes in already-expensive butter attract investigation
More affordable spreads fare better than expensive butter, alongside the rise of plant-based options

PROSPECTS AND OPPORTUNITIES

High prices and ongoing challenges faced by the dairy industry will affect performance dynamics
Butter set to remain popular overall, with enhanced shelf space expected
Margarine will see ongoing improvements to create a healthier image

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2018-2023
Table 22 - Sales of Butter and Spreads by Category: Value 2018-2023
Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023
Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023
Table 25 - NBO Company Shares of Butter and Spreads: % Value 2019-2023
Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2020-2023
Table 27 - Distribution of Butter and Spreads by Format: % Value 2018-2023
Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028
Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028
Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028
Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales of cheese slump due to fewer at-home snacking occasions
Artisanal cheese and traditional telemea remain popular
Domestic variants are high in demand in both soft and hard cheese

PROSPECTS AND OPPORTUNITIES

Cheese sales expected to stabilise due to prevailing demand and competition from artisanal variants
International players will continue to benefit from their local manufacturing operations
Modern retail spaces will continue to open specialist areas for artisanal and regional cheese

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2018-2023
Table 33 - Sales of Cheese by Category: Value 2018-2023
Table 34 - Sales of Cheese by Category: % Volume Growth 2018-2023
Table 35 - Sales of Cheese by Category: % Value Growth 2018-2023
Table 36 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023
Table 37 - Sales of Soft Cheese by Type: % Value 2018-2023
Table 38 - Sales of Hard Cheese by Type: % Value 2018-2023
Table 39 - NBO Company Shares of Cheese: % Value 2019-2023
Table 40 - LBN Brand Shares of Cheese: % Value 2020-2023
Table 41 - Distribution of Cheese by Format: % Value 2018-2023
Table 42 - Forecast Sales of Cheese by Category: Volume 2023-2028
Table 43 - Forecast Sales of Cheese by Category: Value 2023-2028
Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028
Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Government intervenes to help keep end unit prices down, to support sales from local farmers

Full fat cows' milk remains the most popular with Romanian consumers

Goat milk on an upwards trend, although some challenges remain for the subcategory

PROSPECTS AND OPPORTUNITIES

Dynamics in local production will remain key

Vending, direct to the consumer at the farm level, is expected to take off further over the forecast period

International players continue to rely on local brands and domestic production facilities

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2018-2023

Table 47 - Sales of Drinking Milk Products by Category: Value 2018-2023

Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023

Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023

Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023

Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023

Table 52 - Distribution of Drinking Milk Products by Format: % Value 2018-2023

Table 53 - Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028

Table 54 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028

Table 55 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028

Table 56 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Low demand in yoghurt and sour milk products, due to high unit prices

Sour milk products face competition from artisanal variants direct from the farm

Yoghurt remains in demand due to its healthy attributes, although some consumers trade down

PROSPECTS AND OPPORTUNITIES

Return to volume growth expected, thanks to traditional and emerging trends

Competition will remain in the hands of international players with domestic operations

Private labels expected to go from strength to strength

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023

Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023

Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023

Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023

Table 61 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023

Table 62 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023

Table 63 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023

Table 64 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028

Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028

Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028

Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Important category of cream faces cross-industry challenges, impacting the overall performance of other dairy
Plain condensed milk and coffee whiteners fare well, thanks to coffee trends
Local Fagaras and international cottage cheese share product variety

PROSPECTS AND OPPORTUNITIES

A return to positive growth expected, with cream remaining a key component
Plain condensed milk sees much scope for ongoing growth
International players with local brands will retain their leading places, as private label continues to rise

CATEGORY DATA

Table 68 - Sales of Other Dairy by Category: Volume 2018-2023
Table 69 - Sales of Other Dairy by Category: Value 2018-2023
Table 70 - Sales of Other Dairy by Category: % Volume Growth 2018-2023
Table 71 - Sales of Other Dairy by Category: % Value Growth 2018-2023
Table 72 - Sales of Cream by Type: % Value 2018-2023
Table 73 - NBO Company Shares of Other Dairy: % Value 2019-2023
Table 74 - LBN Brand Shares of Other Dairy: % Value 2020-2023
Table 75 - Distribution of Other Dairy by Format: % Value 2018-2023
Table 76 - Forecast Sales of Other Dairy by Category: Volume 2023-2028
Table 77 - Forecast Sales of Other Dairy by Category: Value 2023-2028
Table 78 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028
Table 79 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

Plant-Based Dairy in Romania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Plant-based dairy is the big winner, seeing both value and volume growth
Plant-based milk set to remain key to the overall category, supported by leading Danone
Plant-based yoghurt attracts new players, while Alpro maintains its dominance

PROSPECTS AND OPPORTUNITIES

Plant-based dairy set to go from strength to strength, with a widening user base
Plant-based lifestyles set to continue long-term
Retailers set to allocate more shelf space to plant-based dairy, in line with modern retail expansion

CATEGORY DATA

Table 80 - Sales of Plant-Based Dairy by Category: Value 2018-2023
Table 81 - Sales of Plant-Based Dairy by Category: % Value Growth 2018-2023
Table 82 - NBO Company Shares of Plant-Based Dairy: % Value 2019-2023
Table 83 - LBN Brand Shares of Plant-Based Dairy: % Value 2020-2023
Table 84 - Distribution of Plant-Based Dairy by Format: % Value 2018-2023
Table 85 - Forecast Sales of Plant-Based Dairy by Category: Value 2023-2028
Table 86 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-in-romania/report.