Nutritional & Health Claimed Products Market Development in Serbia: Exploration of Findings Obtained from In Depth Interviews

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Abstract

The main objective of this paper is to present the most relevant findings obtained from in depth interviews with processors and retailers about the N&H claimed products market in Serbia. In our research we addressed the following set of topics: motivations and barriers to offer N&H claimed products at domestic market and perception of consumer demand toward N&H claimed products in Serbia. Significant differences between Serbia and other WBC are explored. Statistical testing includes nonparametric test based on two independent samples (Mann-Whitney test). Findings support overall conclusion that this market segment in Serbia is underdeveloped and rather producer than consumer driven.

Keywords: N&H products market, motivations, barriers, consumer demand, development.

JEL codes: Q13, D21

1. Introduction

The paper presents a part of the most relevant findings on nutritional and health claimed products market that the authors have obtained and analyzed from in depth interviews conducted with experts - producers and retailers in Serbia. The results provided here address our current knowledge on just one of the countries covered by the scope of the research – Serbia. The same research methodology has been applied in other Western Balkans countries (WBC), namely Slovenia, Croatia, Bosnia and Herzegovina, Montenegro and FYR Macedonia. Hence, the results we present for Serbia are highly comparable to those obtained in other five countries of the region. Analysis is based on primary data collected by store check and in-depth interviews. Findings support general theoretical knowledge obtained from various studies previously conducted in more developed economies.

During the 1990-s, government policies, both in developed and developing countries, put more focus on health promotion and preventive measures against illnesses. Thus health has become a life-long project of keeping well and fit, including self-control and continuous work towards better health. (Burrows *et al*, 1995, Petersen and Lupton, 1996, Strauss and Tomas 1998). As a result, people have become generally well aware of the importance of balance, variability and moderation as the cornerstones in eating healthfully (IEFS, 1996a). On the theoretical side, public discussion about the future of eating behaviour and the potential adverse effects of health claim products have become an important topic in scientific literature (Lawrence and Germov, 1999, Roe et. al, 1999, Nestle, 2002, Garde, 2008). On the production side, a new food category termed ‘functional foods’ (foods marketed as improving health and well-being beyond the health effects of conventional foods) gained a substantial market presence in the 1990s (Diplock *et al*, 1999) and started to develop rapidly in market volume during the last decade.

Serbian market of products with N&H claims was initiated during mid 1990`s – first in diary sector and than in other sectors already present in developed countries. Contrary to the previously named trends observed in more developed countries, the market development of such products in Serbia was not followed by significant scientific interest. Generally, little attention has been paid to the market analysis of health claims products, both from consumer’s and producer’s point of view. The analysis of regulatory framework, medical and technological aspects are present at elementary level. Vast majority of articles about products with health claims (functional food) have been published in medical journals by authors that have medical affiliation or medical background (Sobajic, 2002, Miletic et. al, 2008). There are several theoretical articles emphasizing health benefits coming from consumption of functional food or analyzing legal environment and regulations regarding this food type (Stankovic and Djordjevic, 2002). Several papers analyze possible contribution of marketing and technology to the offer of food with health claims (Dimitrijevic-Brankovic et. al, 2002, Dimic et. al, 2002, Ristic, 2003). However, there is still not much data about consumers' knowledge and their attitudes towards functional food.

Within the fields of existing health claims, products development and commercialization (supply side of the food market), the international scientific literature focuses on conceptualization of the innovation process, identification of market opportunities and regulatory/business environment (Van Kleef et al. 2002, Mark-Herbert, 2003, 2004, Stewart-Knox and Mitchell, 2003, Gray et al, 2003, Maynard and Franklin 2003, Korhonen, 2002, Schaafsma & Kok, 2005, Deepananda et al. 2008). Moreover, innovative process oriented research has been developed in a specific case-study context and largely with a focus on Europe (Hall and Mairesse, 2006, Peng et. al. 2006, Broring et. al, 2006). However, the studies published in international journals, mostly present the findings obtained in developed European countries while there is still a lack of data on the developed markets such are those of the Western Balkans. Therefore, the main purpose of analysis elaborated in this paper is to present findings obtained from in depth interviews with processors and retailers about N&H claimed products market in Serbia and test the differences between Serbia and other WBC with respect to processors' and retailers' motivations and barriers to produce/sell N&H claimed products as well as their perception of consumer demand.

2. Research questions and methodology

In our research related to motivation, barriers and perception of N&H claimed products consumer demand in Serbia we addressed the following sets of questions: (1) What are the motives and restraints for production of N&H claimed products in Serbia? Are there any differences between different food system stakeholders regarding this issue? Are there any differences among WBC? (2) Could healthy diet be considered as the primary motive for consumption? Could consumer knowledge and price of products be considered as the major

barriers for heavier consumption of N&H products? Are there any other important barriers? Are there any differences regarding this issue among WBC?
The research methodology applied in the study on food consumption in WBC is based on a multi-technique (a number of both qualitative and quantitative research techniques was used) and multi-stakeholder approach (a number of different stakeholders were interviewed). The aim is to collect as much as possible information in order to contribute to better understanding of the characteristics of N&H claimed products market. Different families of N&H products have been covered by this study, i.e. milk and nectars enriched with vitamins and minerals, dietetic jam, light margarine and yoghurt with probiotics.

Any kind of market research provides better information if it is based on previously determined supply structure. Therefore, for the purposes of our study we used linear and specialized store check as the most reliable method for obtaining the data revealing the existing supply structure. Additional benefit was reflected in the detailed structure of manufacturers offering studied categories of product at the market. Hence, the store check served us as a basis for sampling since it has provided the list of producers to be invited to participate in interviewing. The store check was conducted in mayor retail chains including: international retail chain, regionally present retail chain, the key retail chain present only at the domestic market and key retail chain of the so-called healthy food (specialized shops).

The producers included in our sample were interviewed using the strict methodology of in-depth interviews as a well accepted qualitative research technique. The instrument used was a specially designed questionnaire comprising of mostly open-ended questions emphasizing the qualitative, in-depth aspects of an issue. Close-ended questions were also used however only as a part of already established open-ended issues and only after the spontaneous response of the interviewees. These included different forms - dichotomous (yes or no) question, multiple choice question, rank order scaling and rating scales questions. Probing and follow-up questions were used whenever it was possible and required. Interviewees were asked about overall attitude toward consumers demand, main criteria and restraints for consumer's choice, perceived consumers' characteristics and each stakeholder cross-perception. Additionally, processors and retailers were asked to provide insights about markets – the current state, trends and perspectives.

Each interview lasted approximately an hour. In total, 29 out of 45 identified producers and 26 retailers present in all WBC were interviewed. Additionally, seven EU exporters of studied categories of products regionally present in WBC were interviewed. The overall respondent rate was 71%. If we look at the number of observations, the analysis was based on the totally 120 products[1]. Based on all we may conclude that the list of processors and retailers included into the analysis enables high rate of research reliability.

Since in this paper we primary focus on the motives and barriers for producing and marketing N&H claimed products among Serbian producers and retailers, while trying to explore any significant differences between Serbia and other WBC, the detailed structure of respondents in Serbia only is provided in the following table:

Table 1: Structure of in depth interviews in Serbia

Criteria	Structure	No of interviews
Category of products with H&N claim	Jam for persons suffering from diabetes	4
	Yogurt with probiotics	5
	Milk enriched with vitamins and minerals	5
	"Light margarine" with reduced fat content	6
	Juice enriched with vitamins and minerals	7
	Other products	2
Stakeholder	Processor	10
	Retailer	5
Company size (number of employees)	Small companies (up to 50)	1
	Medium-size companies (50-250)	7
	Large companies (more than 250)	7

Statistical testing used to analyze if there are any significant differences in motivations, barriers and attitudes toward consumer demand for N&H claimed products between Serbia and other

[1] One interview covers two categories of products surveyed by a questionnaire. Thus, the number of observed products in relation to the interviews done is higher: 62 for processors and 58 for retailers.

WBC, includes nonparametric test based on two independent samples. More precisely, Mann-Whitney (MW) test is provided as it examines whether two groups are drawn from the same population on the basis of the rank of each group and the sum of ranks.

3. Findings and elaboration

3.1 The main findings obtained from in depth interviews in Serbia

Serbian processors find that the improvement of company's image is the most important motive for the development of products with N&H claim. Opposite to that, the least important motives are following the EU trends and improvement of market position of the company. Therefore, it could be concluded that introducing such a kind of product can strengthen the current position of the company, but it cannot shift company's position (follower to overcome leaders). With regard to the fact that most companies said that their margins for products with N&H claims are higher than their margins for regular products, but that the share of products with N&H claims is very low in their total sale, it is understandable that the profit is not ranked higher on this motivation scale. Some companies mentioned that they launched products with N&H claims in order to be socially responsible, to broaden their assortment and to educate consumers.

Regarding barriers, the respondents seem to perceive all problems in product development to be almost equally treated and not so important (average mark is from 1.70 to 2.50 on the scale 1-5, where 1 means not important at all). Problems in R&D are the least important among all. Scientific problems (relations with research centres in the country, scientific programs publicly supported in the area of functional food etc) are recognized as the most problematic, especially for the dairy sector. Most of interviewed firms reported no significant financial problems during products' development (half of the respondents marked it 1 on 5 point scale). However, many of them seem to have some problem with insufficient knowledge of consumers' needs (average mark is 2.30). The processors also identified some other barriers, such as: decrease in purchase power due to world economic crisis, long period of waiting to obtain necessary licenses, short shelf life of some ingredients and high market competitiveness (particularly in diary sector). Processors think that consumers are generally uninformed about benefits of products with N&H claims and that they need better publicly supported education. They are also ready to educate their consumers by specific promotional activities.

Similar to producers, interviewed retailers spontaneously point out the image as the main reason for selling these products. Answering the consumer's demand and improving the market position are on second and third place, respectively. These results show that retailers see products in these categories as the way to improve it's positioning in the consumers minds. It is the way to create and keep position with consumers. Median rank of profit motivation is 4, indicating the increase of the profit motivation in the future. The main barriers for N&H claim products are consumer related. Consumer's awareness, low demand and eating habits are point out as the main problems for retailers concerning studied categories. Consumers are not aware of these categories and they mostly do not include them in their diets. Availability of products, logistic difficulties, price and competition are not seen as the important problems.

Majority of processors think that price and taste are the most relevant criteria when consumers decide whether to buy products, while labels are the least important. It means that consumers should be more educated about labels in the future. The processors think that consumers do not take into consideration safety and health aspects when they do their shopping. Overall conclusion is that Serbian consumers are very price sensitive. Additionaly, most of the retailers put price criterion in the first place. Consumers purchase power is low and they often avoid to buy products which are more expensive than average ones. Hence, the main reason why consumers do not buy products with N&H claims more in Serbia are seen as an part of the economic restraint. On the other hand, processors do not think that they are responsible for the low demand for this kind of products. However, retailers and processors point out that Serbian government does not pay enough attention to development of national policy for nutrition. They think that consumers get all information on this topic from the media, and that producers must put their own efforts in education of consumers on this matter in the future. It is also interesting that nutritive knowledge restraints are perceived to be slightly more important than habit restraints, meaning that diet habits could be overcome with education.

Interviewees think that the demand for products with H&N claims in Serbia will increase in the future. This increase will be caused by higher average income in the first place, but also by the acceptance of EU trends. Consumers will be more educated and oriented toward healthier lifestyle, while the institutions that promote healthy diet will be more active in the field.

3.2 Motives and barriers to offer products with N&H claims: Exploring the differences between Serbia and other WBC

Regarding processors' **motivations** to develop products with N&H claims, test results show that differences in processors' opinion on motivations between Serbia and other WBC are not statistically significant (Table 2). As far as retailers' motivations to sell N&H products are concerned, similar conclusions can be derived. According to the test results, differences between Serbia and other WBC appear to be insignificant, with one exception. Namely, differences between Serbian retailers' and retailers in other WBC are statistically significant regarding their perception on the importance of following the trend as in European countries as motive in making decision to sell N&H products. This motive seems to be more important in other WBC (the median and mode rank equals 3, where rank 1 means the most important motive) then in Serbia (both median rank and mode are 5).

Table 2
Testing of differences in motives and barriers to offer N&H products between Serbia and other WBC

Man-Whitney test	**Processors**		**Retailers**	
Motivations	**Test statistics**	**p-value**	**Test statistics**	**p-value**
Profit	-0.142	0.887	-1.376	0.169
Image	-0.716	0.474	-1.267	0.205
Consumer demand	-1.166	0.244	-0.737	0.461
EU trend	-1.453	0.146	-2.962***	0.003
Market position	-1.191	0.234	-1.319	0.187
Barriers				
Financial problem	-0.320	0.749		
Scientif. asist.problem	-1.062	0.288		
Regulation	-0.049	0.961		
R&D problem	-0.272	0.786		
Info problem	-0.904	0.366		
Availability			-1.586	0.113
Foreign comp.difficul.			-2.054**	0.040
Price			-0.684	0.494
Logistic difficulty			-1.470	0.141
Low demand			-0.891	0.373
Cons. awareness			-0.888	0.374
Habit problem			-0.032	0.975
Compet. problem			-0.241	0.809

*Significant at 10% significant level. ** Significant at 5% significant level.
*** Significant at 1% significant level.

Concerning **main problems** to develop N&H products, significant differences between the processors' opinion in Serbia and in other WBC were not found. On the basis of this test result, it seems that processors from all WBC perceive the problems in the same way. For instance, both processors from Serbia and other WBC state that they have no problems such as financial, scientific, regulation, R&D problem (mode and median marks are 1 or 2, except info-problem where these marks equal 3). With respect to retailers' problems in meeting consumer's demand of N&H products, it could be said that significant differences between Serbia and other WBC appear only in one problem, that is in difficulties of relationship with foreign companies (value of MW statistics is significant at 5% level; Table 2). While retailers operating on the Serbian market report insignificant difficulties of relationship with foreign companies (all interviewed retailers mark this problem as not important at all or not important), retailers present at rest of WBC market (mostly from underdeveloped N&H claimed products market in Macedonia, B&H and Montenegro) reported slightly higher marks for this problem (7 out of 19 retailers have positive perception of this problem existence).

3.3 The processors' and retailers' perception of consumer demand and behavior for N&H products: Exploring the differences between Serbia and other WBC

Speaking about processors' opinion on the **consumer perception and behaviour for its N&H products**, the whole WBC region could be observed as rather homogenous. Test results show insignificant differences in processors' perceptions of the importance of any criteria of consumer's choice of products for the company's family of products (Table 3). In other words, processors from the whole region ranked the importance of observed criteria in similar way. For instance, the most of processors from Serbia and those from other WBC answered that the price criteria, following by taste criteria are the most important (mode rank for price is 1 and for taste is 2 both in Serbia and other WBC; median ranks for price and taste are 2 in Serbia, while in other WBC 3 and 2, respectively). Contrary to this, labels and indication of origin are ranked as the least important criteria (mode and median rank is 6 in both cases).

On the other hand, there are differences between Serbian retailers and those from other WBC in perceiving the importance of price criteria as well as labels and indication of origin (values of test statistics are significant at 10% and 5%, respectively). Retailers in Serbia perceive price criteria as more important than taste, freshness and health related criteria (median rank of later is 3) while health dimension of diet is seen as the most important criteria for consumer choice of food in other WBC. As far as the importance of other criteria is concerned retailers in Serbia have no statistically different statements in comparison to those in other WBC.

With respect to **main restrictions for consumers** to buy products with N&H claims, significant differences between Serbian processors' and other WBC processors' perception refer to two restrictions: price and economic difficulties (both MW test statistics are significant at 5%). Serbian processors consider N&H claimed products less available to the consumers who are exposed to more significant economic difficulties (both median and mode is 5 compared to 4 in other WBC). Morever, there is some indication of differences in perception of availability constraint between Serbian and other WBC retailers, as that difference is significant at 10%. In the case of other WBC, eating habits are seen as the most important restriction for consumers to buy products with N&H claims.

Table 3
Testing of differences in the perception of N&H claimed products consumer demand between Serbia and other WBC

Man-Whitney test	Processors Test statistics	p-value	Retailers Test statistics	p-value
Demand high	-1.538	0.124	-1.355	0.175
Food choice criteria				
Price	-0.738	0.461	-1.757*	0.079
Taste	-0.334	0.739	-1.594	0.111
Safety	-0.287	0.774	-0.862	0.389
Freshness	-1.010	0.312	-0.444	0.657
Health dimens.	-0.739	0.460	-0.392	0.695
Label	-0.430	0.667	-2.086**	0.037
Restrictions of demand				
Price	-2.316**	0.021	-0.760	0.447
Econ. Difficulty	-2.507**	0.012	-0.739	0.460
Nutrition knowledge	-0.501	0.617	-0.187	0.852
Availability	-1.537	0.124	-1.767*	0.077
Habits	-1.190	0.234	-0.276	0.782
National policy	-0.685	0.493	-0.156	0.876
Factors of change				
Nutrition knowledge	-0.504	0.615	-0.972	0.331
Health	-0.395	0.693	-1.600	0.110
Public policy	-1.651*	0.099	-2.280**	0.023
Purchase power	-0.477	0.634	-0.776	0.437
Lifestyle	-1.353	0.176	-0.728	0.467
Fashion	-1.933**	0.050	-1.539	0.124
Consumer changes	-1.985**	0.047	-0.607	0.544

*Significant at 10% significant level. ** Significant at 5% significant level.
*** Significant at 1% significant level.

Within the analysis of **perspectives about future consumption of products with H&N claims**, one of the main questions refers to the factors of change in future food consumption. Observing by countries, it seems that processors in Serbia have similar statements as processors in other WBC with respect to the following factors of change (consumer nutritional knowledge, health dimension of food, purchasing power change and lifestyle). Some indications of differences are related to public policy factor (at 10% significance level), while statistically significant difference is found in case of fashion as factor of change in future food consumption. Fashion is perceived as more important in Serbia than in other WBC. More open Serbian borders both for companies and people will bring more competitiveness and educated persons who will be aware of N&H products additional health benefits. It is also important to notice that knowledge, as the factor of future consumption change, is highly marked both in Serbia and other WBC (median mark is 5).

Retailers from Serbia and other WBC have different statements only regarding public policy as a factor of change in future consumption of N&H products (MW statistics is significant at 5%). It seems that retailers in Serbia do not expect significant change of the public policy as they mark this factor importance lower than retailers in other WBC. It also implies conclusion that retailers do not expect significant consumers demand changes due to the inconsistent public support both in the terms of incentives to offer and promote these products and to provide better education to the consumers.

4. Conclusion

The most important findings obtained from in depth interviews about motivations, barriers and perception of consumer demand for N&H claimed products in Serbia can be summarized as follows. Processors find that the improvement of company's image is the most important motive for the development of products with N&H claim. The main barriers for the market development are consumer related. Most of interviewees think that price and taste are the most relevant criteria when consumers decide whether to buy food products, while labels are the least important.

Regarding motivations and barriers, the tests show that the differences between Serbia and other WBC appear to be insignificant, with a few exceptions. As far as retailers opinion is concerned, following the trend as in European countries as motive and difficulties of relationship with foreign companies as problem seem to be more important in other WBC then in Serbia. Speaking about the consumer perception and behaviour, differences between Serbian retailers and those from other WBC in perceiving the importance of price criteria as well as labels and indication of origin exist. However, Serbian processors consider N&H claimed products less available and more expensive than in other WBC. Within the analysis of perspectives about future consumption of products with H&N claims, some indications of differences are related to the public policy factor while statistically significant difference is found in case of fashion as factor of change in future food consumption.

Most of N&H claimed products in Serbia were introduced by domestic companies from the year 2000. It is obviously the new market segment addressed to the innovators and early adopters. Hence, findings support overall conclusion that this market segment in Serbia is rather producer than consumer driven. However, it is important to underline that perceptions of healthy food are exposed to turbulent environment in Serbia: change in market structure, changes in regulation, internationalization and competition. The development of the "functional food market" remains uncertain mainly linked to changes in consumers' purchasing power, increased awareness on the importance of food and nutritional knowledge, as well as the inconsistent public policies.

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