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## Boosting consumption frequency – the main challenge

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Although fresh, plain milk without flavors is consumed by 87% of the Romanians in the urban area, only a third include it in their daily menu, which means that, on the medium term, the category could grow especially by boosting consumption frequency. This is the conclusion of the most recent study conducted by ISRA Center MR agency, exclusively for the Progressive Magazine.



Extra sales could be generated by converting those consumers who still prefer non-industrialized milk and whose percentages go up to even 10% in some regions. For flavored milk, which has a much smaller penetration - only 12%, the main challenge remains drawing more consumers. Retailers and producers should also be working on creating new consumption occasions, given that 51% of the consumers of plain milk (no flavors) and 83% of those who usually drink flavored milk consume milk simple, as it is.

The data were collected by the research agency in February 17 – 29, 2012 via face-to-face interviews at respondents' homes, based on a quantitative questionnaire. The sample included 1.111 persons aged 20 to 60, living in the urban area (cities with over 50.000 residents). The study has a sampling error of ± 2,9%.

### Consumption and purchase habits

The results of the study conducted by ISRA Center show that fresh, plain milk is consumed by 87% of the Romanians in the urban area at least once every 2 weeks, while flavored milk has a much smaller penetration – only 12%. For the latter, the most frequently chosen flavor is chocolate/ cocoa (64%) and it is followed at a distance by strawberry (15%) and vanilla (10%) flavors.

Socio-demographics bring additional information: plain milk is consumed more often by the 30 – 39 age category (34% daily) and by women (36% daily). On the other hand, it is less consumed by the persons with incomes over 3.000 and by Bucharest residents. Flavored milk is more consumed among the persons aged 20 to 29 (32% consume it, compared to 24% of the total population) and by respondents in Moldavia. Fewer consumers can be found among participants with household incomes under 1.800 lei.

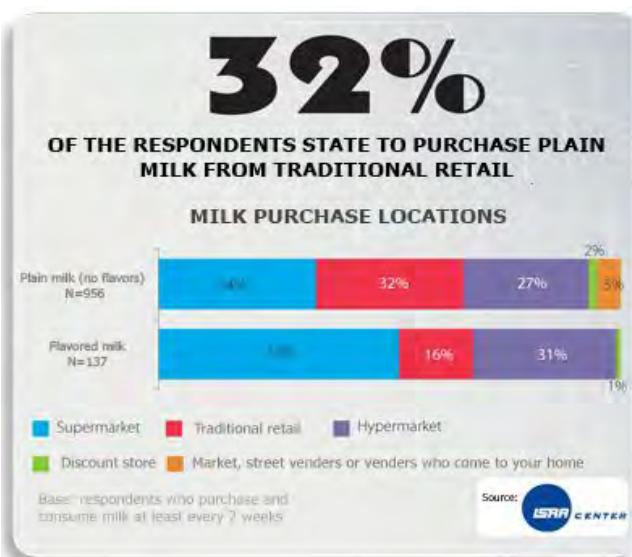


As far as the purchase frequency is concerned, 9 in 10 consumers purchase a product from this category at least once a week. For plain milk, the distribution per purchase channels is evenly divided between the supermarket, traditional retail and the hypermarket, but 5% of the consumers prefer unbranded products from the countryside dairy farms.

The managers of traditional stores in particular should know that persons with low education, with household incomes under 1.800 lei and aged over 50 usually purchase more fresh milk from this type of retail. At the opposite end are respondents with higher education and high incomes, who turn to the hypermarkets to a greater extent. Last but not least, half of the interviewees who stated to usually consume flavored milk purchase these products from the supermarket.

### Milk is mostly consumed simple

Only 45% of the respondents who consume plain milk prefer it in combination with other food products, especially with cereals (67%). This category includes young persons, people with higher education as well as those with high incomes.

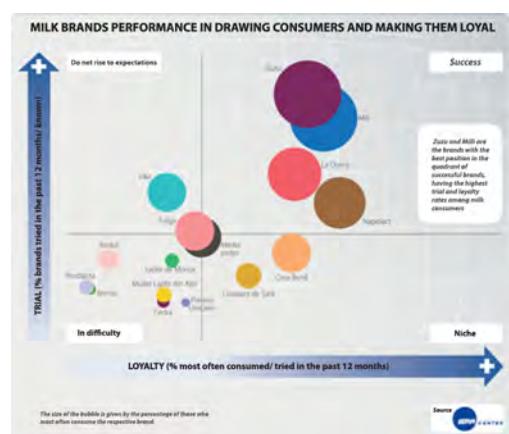


The tendency to consume milk combined with food products is significantly higher in Moldavia and Oltenia, while milk is consumed simple especially by Bucharest respondents and participants with incomes over 3.000 lei. An analysis of the moments of the day allotted to milk consumption shows that plain milk is consumed especially at breakfast, while flavored milk is rather consumed between meals.

Three quarters of the plain milk consumers prefer milk in a cardboard box, 74% of them choosing pasteurized milk. The research has also shown that more than half of the respondents (62%) consume semi-skimmed milk with 1.5-2% fat.

## Milli and Zuzu in the top of awareness

In the top of unprompted awareness of milk brands are Milli, Zuzu and LaDorna, the last two benefitting from a higher awareness among respondents in Bucharest and persons with high incomes. As far as prompted awareness is concerned, seven brands get clearly detached: Milli, Zuzu, Fulga, LaDorna, Napolact, Casa Buna and Oke. The top 3 milk brands consumed in the past month but also consumed most frequently are Zuzu, Milli and LaDorna. In the past month, but also most frequently, Zuzu was consumed more by Bucharest residents as well as by the persons with high incomes, while Milli was consumed more by participants with low education, Transylvania respondents and by the population in large urban areas (cities with over 250.000 residents). Moldavia respondents in particular prefer LaDorna brand.



When asked which of the following milk brands they take into account for purchase, even if purchased before or not, the top 5 brands mentioned by respondents were Milli, Zuzu, LaDorna, Napolact and Fulga. The young persons, Bucharest residents and persons with high incomes take into account Zuzu brand for consumption to a greater extent, while Milli is mentioned especially by Transylvania respondents.

The study has also revealed that Zuzu and Milli have the highest ability to make consumers take the brand into account. In addition, Zuzu also has the highest ability to trigger trial. Napolact has a level of performance in line with the market mean, but loses when it comes to convincing consumers to take the brand into account.

## Opportunities and challenges on milk market

Based on the study findings, ISRA Center specialists have identified a few ways to grow the category in the following period of time:

- fresh, plain milk is consumed almost by the entire adult population in the urban area, representing a market with a high potential for development which may come especially from boosting consumption frequency, as only one third of the population targeted consumes fresh milk every day (26% consume it 2 – 3 times a week, and 18% - once a week or once every 2 weeks);
- another opportunity for market growth is the potential conversion of those who still prefer non-industrialized milk straight from countryside dairy farms. 5% of the total number of consumers have this

preference, and percentage goes up to 8% in Transylvania, 9% among residents of medium-sized cities and 10% among participants with low education;

- flavored milk has a small consumption share, being rather a product for occasional consumption. In these products' case, the challenge is how to draw more consumers; in this context, the segment of young consumers (aged 20 to 29), where this product is successful, can be particularly targeted.

- plain milk is consumed simple by half of those who choose this product, and when it is consumed with other food products, the classic variants are preferred: milk with cereals, bread or sweets. Some ideas for more consumption alternatives could represent a way to increase milk consumption frequency. The same recommendation is valid for flavored milk as well;

- plain milk is consumed particularly in the morning, at breakfast. From this point of view, opportunities for category growth could come from the endorsement of consumption on other moments of the day also; for example, milk is consumed between meals only by a quarter of the interviewees, and in the evening, before going to sleep, only by 20% of the respondents;

- flavored milk is consumed especially between meals, but there is an important niche that is worth developing: consumption before going to sleep, especially in the case of the honey or vanilla variants, known for their relaxing effect.

To download the full study, click [HERE!](#)