

**SeeNews**

• Research on demand

## **Food Supplements Market in Romania in 2012**

### Table of Contents

1. Methodology.....	3
2. Legislation.....	3
2.1 EU legislation .....	3
2.2 National legislation .....	4
3. Stakeholders in Romanian food supplements market. ....	4
4. Categories of food supplements .....	5
<i>Table 1 - Vitamins allowed as ingredients of food supplements</i> .....	6
<i>Table 2 - Minerals allowed as ingredients of food supplements</i> .....	6
5. Market overview .....	7
6. Market size.....	7
<i>Table 3 - Romanian Pharmaceuticals Market</i> .....	8
<i>Table 4 - Romanian Food Supplements Market</i> .....	9
<i>Chart 1 - Vitamins and minerals market size</i> .....	10
7. Main players.....	11
<i>Table 5 - Walmark Romania Srl Profile</i> .....	11
<i>Table 6 - Radix SRL profile</i> .....	12
<i>Table 7 - Herbalife RO SRL profile</i> .....	13
8. Forecasts .....	14

The market research aims to:

- ✓ Determine the size of Romanian food supplements market;
- ✓ Outline the main players in the sector;
- ✓ Define the main legislation documents related to food supplements in the European Union (EU) and Romania;
- ✓ Evaluate the potential for growth, and
- ✓ Indicate the future trends.

### 1. Methodology

The market research follows a methodology based on desktop research. We looked through official sources including European Commission (EC), European Food Safety Authority, Association of the European Self-Medication Industry, Ministry of Health of Romania, *National Institute of Public Health* and Ministry of Public Finance of Romania.

We have gathered data from the companies' websites and monitored latest news in the food supplements market in Romania. The supplements which contain vitamins and minerals have been mainly analysed but the supplements whose ingredients are other substances such as herbals, fatty acids, amino acids and probiotics are included in the market research as well.

### 2. Legislation

#### 2.1 EU legislation

Directive 2002/46/EC of the European Parliament and Council establishes requirements related to labelling and minimum and maximum levels of each vitamin and mineral included in food supplements. Annex II of the Directive comprises a list of allowed vitamin and mineral substances that may be used in food supplements with certain nutritional aims. It was amended by [Commission Directive 2006/37/EC](#), [Commission Regulation \(EC\) 1170/2009](#) and [Commission Regulation \(EU\) 1161/2011](#) and as a result additional substances were included to the list. Companies that want to market a substance, which is not in the allowed list, should file an application to the EC.

According to Directive 2002/46, in order to simplify the procedure of monitoring food supplements, the producers or the people placing a food supplement on the market shall notify the competent authority by sending a model of the label used for the corresponding product.

EU Regulation 432/2012 became effective on Dec 14, 2012 and it defined a list of allowed health claims on food supplements' labels. Packages and advertising of food supplements are permitted to use only health statements from the EU white list. More than 1,700 health claims have been discarded from the list and could not be used and only 222 health claims remained available.

Directorate General Health and Consumers at EC has deputed a study on the usage of substances, different from vitamins and minerals, with nutritional or physiological effects as ingredients of food supplements. As a result of this study, the Commission concluded that imposing specific rules to these substances is not justified. EC also lacks confidence in the feasibility of such a measure which is not needed in the short term. The usage of these substances for food supplements' production currently remains in the scope of national legislation of the corresponding country.

### **2.2 National legislation**

Emergency Government Ordinance (EGO) 97/2001 is a regulation document that deals with manufacturing, distribution and commercialisation of food supplements and Law 57/2002 ratifies it. EGO 97/2001 is still valid and according to it the Ministry of Health of Romania is entrusted to bring in regulations regarding food supplements and fortified foods. The regulations must impose rules for fortifying and restoration of food through adding nutrients and also rules for the production and commercialisation of food supplements that consist of nutrients. The regulations must specify the recommended daily nutrients intake.

The food supplements issuance is regulated in Romania as per Order 243/402/2005 of the Ministry of *Agriculture, Forestry and Rural Development of Romania* and Ministry of Health, Order 1228/244/63/2005 of the *The Ministry of Agriculture, Forestry and Rural Development of Romania*, Ministry of Health and the President of the National Sanitary Veterinary and Food Safety Authority and also Order 1069/2007 of the Ministry of Health.

### **3. Stakeholders in Romanian food supplements market.**

The Ministry of Health, which issued a legislative document regarding food supplements in Romania in 2000, is authorised to deal with notifications of food supplements whose ingredients are exclusively synthetic nutrients such as vitamins and minerals.

Other stakeholders are the Ministry of *Agriculture, Forestry and Rural Development of Romania* and the *Institute of Food Bioresources (IBA Bucharest)* which is part of the Ministry. The Institute was established in 2000 and according to Order 1228/2005 it is the competent authority regarding notifications of the following types of products:

- *animal and vegetable extracts and other processed products of animal and vegetable origin;*
- *mixtures of vegetable and animal extracts, their mixtures with vitamins and/or minerals, comprising mixtures of vitamins and/or minerals with medicinal and aromatic plants, products of animal origin, microorganisms, amino acids, fats of vegetable and animal origin and other nutrients;*
- *bee products, their mixtures with medicinal plants, aromatic plants and/or other products of animal origin and/or vitamins, minerals, essential oils and other nutrients, and*
- *other products scientifically proved to be food supplements, which are not included in Order 1069/2007 and Order 244/401/2005 of the Ministry of Agriculture, Forestry and Rural Development and The Ministry of Health regarding the processing and commercialisation of medicinal and aromatic plants.*

*Another stakeholder is the National Sanitary Veterinary and Food Safety Authority* which is a state sanitary veterinary service organisation and it is subordinate to the Government of Romania.

The Romanian Food Industry Federation, Romalimenta, represents the food and drink industry of Romania. It is an employer branch organisation and aims at development of its members.

The Romanian Employers Food Supplements Industry (PRISA) is an association with 16 members and it is a member of the International Alliance of Dietary/Food Supplement Associations (IADSA).

#### **4. Categories of food supplements**

According to the definition of Directive 2002/46/EC and Order 1069/2007 there are two broad categories of food supplements:

- Food supplements that contain vitamins and/or minerals
- Food supplements that contain other substances with a nutritional or physiological effects such as herbals, fatty acids, amino acids, probiotics.

**Table 1 - Vitamins allowed as ingredients of food supplements**

Vitamins	Unit	Recommended Daily Intake (RDI)
Vitamin A	µg	800
Vitamin D	µg	5.0
Vitamin E	mg	12
Vitamin K	µg	75
Vitamin C	mg	80
Vitamin B1 (thiamine)	mg	1.1
Vitamin B2 (tibo flavina)	mg	1.4
Niacin	mg	16
Vitamin B6 (pyridoxine)	mg	1.4
Folic acid	µg	200
Vitamin B12 (cyanocobalamin)	µg	2.5
Vitamin B7 (biotin)	µg	50
Vitamin B5 (pantothenic acid)	mg	6.0

Source: [www.rivistadirittoalimentare.it](http://www.rivistadirittoalimentare.it)

**Table 2 - Minerals allowed as ingredients of food supplements**

Minerals	Unit	Recommended Daily Intake (RDI)
Potassium	mg	2,000
Chloride	mg	800
Calcium	mg	800
Phosphorus	mg	700
Magnesium	mg	375
Iron	mg	14
Zinc	mg	10
Copper	mg	1.0
Manganese	mg	2.0

<b>Fluoride</b>	mg	3.5
<b>Selenium</b>	µg	55
<b>Chromium</b>	µg	40
<b>Molybdenum</b>	µg	50
<b>Iodine</b>	µg	150

Source: [www.rivistadirittoalimentare.it](http://www.rivistadirittoalimentare.it)

## 5. Market overview

According to the market research company PMR Research, the size of food supplements market in Central Europe in 2011 exceeded EUR 1.0 bln for the first time. In Romania the market in 2011 increased by 24% year-on-year. Although Romanian food supplements market in 2011 was the fastest growing compared to the markets of Poland, Bulgaria, Hungary, Slovakia and the Czech Republic, it was with the lowest per capita spending on food supplements. The consumption of Romanians stands at only two boxes of vitamins annually.

The Romanian food supplements market stood at EUR 250 mln as of October 2013, which is approximately EUR 12.5 per capita *according to PRISA*. The consumption of food supplements in Europe at the same time was EUR 100 per capita. The number of food supplements products that were lawfully sold on the Romanian market was estimated between 17,000 and 18,000.

According to the National Service for Aromatic and Medicinal Plants and Hive Products, the proportion between importers and local manufacturers of food supplements in Romania was 55% for importers and 45% for manufacturers in terms of sales volume as of October 2013. The number of companies working in the food supplements industry as manufacturers and/or wholesalers was 182, of which 63 located in Bucharest, the capital of Romania and a total of 402 importers, of which 265 in Bucharest.

## 6. Market size

The net sales revenue of the 20 biggest pharmaceutical companies, which manufacture, distribute or import food supplements but this is not their main activity, totalled RON 11.6 bln in 2012, with a compound annual growth rate (CAGR) of 9.2%.

**Table 3 - Romanian Pharmaceuticals Market**

Company name	Net sales revenue 2012 (mln RON)	Market share 2012	Market penetration 2012	Net sales revenue 2011 (mln RON)	Market share 2011	Net sales revenue 2010 (mln RON)	Market share 2010
Mediplus Exim SA	3,146.7	27.2%	27.2%	2,700.5	27.9%	2,330.2	26.2%
Farmexim SA	1,122.0	9.7%	36.9%	972.5	10.0%	842.2	9.5%
Fildas Trading SRL	1,115.3	9.6%	46.6%	935.2	9.7%	924.9	10.4%
Sensiblu SRL	1,090.2	9.4%	56.0%	920.8	9.5%	989.8	11.1%
Bayer SRL	509.1	4.4%	60.4%	298.0	3.1%	239.8	2.7%
Pfizer Romania SRL	484.1	4.2%	64.6%	117.7	1.2%	110.9	1.2%
Terapia S.A.	471.5	4.1%	68.7%	421.2	4.4%	376.3	4.2%
Europharm SA	463.5	4.0%	72.7%	407.8	4.2%	380.6	4.3%
Romastru Trading SRL	436.4	3.8%	76.4%	358.4	3.7%	255.5	2.9%
A & G Med Trading SRL	386.4	3.3%	79.8%	361.0	3.7%	256.3	2.9%
Pharmafarm SA	373.3	3.2%	83.0%	302.7	3.1%	330.5	3.7%
Actavis SRL	358.5	3.1%	86.1%	330.3	3.4%	414.1	4.7%
Sandoz SRL	261.2	2.3%	88.4%	272.7	2.8%	290.6	3.3%
Teva Pharmaceuticals SRL	255.6	2.2%	90.6%	170.0	1.8%	128.8	1.4%
Zentiva SA	242.5	2.1%	92.7%	235.6	2.4%	259.6	2.9%
Farmaceutica Remedia SA	237.4	2.1%	94.7%	203.5	2.1%	182.6	2.1%
A&D Pharma Marketing & Sales Services SRL	203.6	1.8%	96.5%	148.2	1.5%	26.4	0.3%
Gedeon Richter Farmacia SA	142.2	1.2%	97.7%	169.9	1.8%	165.6	1.9%
Centrofarm SA	134.9	1.2%	98.9%	159.3	1.6%	160.4	1.8%
Labormed Pharma SA	129.6	1.1%	100.0%	192.4	2.0%	219.6	2.5%
<b>Total</b>	<b>11,564.0</b>	<b>100.0%</b>		<b>9,677.7</b>	<b>100.0%</b>	<b>8,885</b>	<b>100.0%</b>

Source: Romanian Ministry of Finance

The net sales revenue of the 20 biggest companies, whose primary activity is manufacturing, distributing or importing food supplements, totalled RON 535.8 mln in 2012, with a compound annual growth rate (CAGR) of 10.3%.



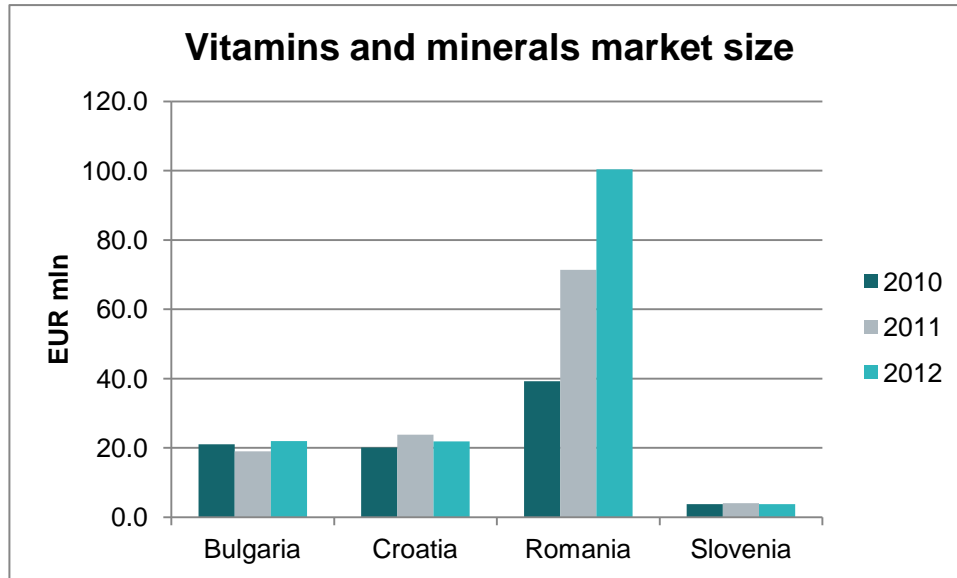
**Table 4 - Romanian Food Supplements Market**

Romanian Food Supplements Market							
Company name	Net sales revenue 2012 (mln RON)	Market share 2012	Market penetration 2012	Net sales revenue 2011 (mln RON)	Market share 2011	Net sales revenue 2010 (mln RON)	Market share 2011
Walmart Romania SRL	73.6	13.7%	13.7%	64.5	14.2%	57.7	14.5%
Radix SRL	56.7	10.6%	24.3%	49.0	10.8%	46.0	11.5%
Herbalife RO SRL	53.7	10.0%	34.3%	38.8	8.6%	25.5	6.4%
Forever Living Products Romania SRL	53.6	10.0%	44.3%	57.9	12.8%	64.2	16.1%
Laboratoarele Fares Bio Vital SRL	48.1	9.0%	53.3%	39.8	8.8%	32.5	8.1%
Secom Productie Servicii SRL	30.9	5.8%	59.1%	22.4	4.9%	15.7	3.9%
Hofigal Export Import SA	26.2	4.9%	64.0%	22.9	5.1%	23.0	5.8%
Sun Medic Invest SRL	24.4	4.6%	68.5%	19.2	4.2%	13.7	3.4%
Dacia Plant SRL	24.1	4.5%	73.0%	19.0	4.2%	13.6	3.4%
Pharco Impex 93 Srl	23.2	4.3%	77.4%	21.6	4.8%	25.8	6.5%
Zdrovit Romania SRL	20.3	3.8%	81.1%	14.0	3.1%	6.8	1.7%
Sunwave Pharma SRL	18.7	3.5%	84.6%	10.9	2.4%	9.3	2.3%
Zenyth Pharmaceuticals SRL	17.9	3.3%	88.0%	24.3	5.3%	14.9	3.7%
Alevia SRL	16.7	3.1%	91.1%	11.6	2.6%	9.6	2.4%
Pro Nutrition Impex SRL	15.1	2.8%	93.9%	12.2	2.7%	10.7	2.7%
Coseli SA	12.4	2.3%	96.2%	11.5	2.5%	13.7	3.4%
Parapharm SRL	8.8	1.6%	97.9%	3.6	0.8%	7.0	1.8%
Sanye Intercom SRL	7.5	1.4%	99.3%	6.6	1.5%	5.7	1.4%
Star International Med Impex SRL	2.3	0.4%	99.7%	2.5	0.5%	2.2	0.6%
Sprint Pharma SRL	1.5	0.3%	100.0%	1.4	0.3%	1.6	0.4%
<b>Total</b>	<b>535.8</b>	<b>100.0%</b>		<b>453.9</b>	<b>100.0%</b>	<b>399.3</b>	<b>100.0%</b>

Source: Romanian Ministry of Finance

According to the Association of the European Self-Medication Industry, the market size of vitamins and minerals in Romania jumped to EUR 100.4 mln in 2012 compared to EUR 71.4 mln in 2011 and EUR 39.2 mln in 2010.

**Chart 1 - Vitamins and minerals market size**



Source: Association of the European Self-Medication Industry

## 7. Main players

**Table 5 - Walmark Romania Srl Profile**

<b>Name</b>	Walmark Romania Srl
<b>Date of establishment</b>	Aug 31, 2005
<b>Headquarters</b>	020104 Bucharest, 7 Fecioarei Str.
<b>Website</b>	www.walmark.eu
<b>E-mail</b>	info@walmark.ro
<b>Phones</b>	+40 21 211 21 34
<b>Fax</b>	+40 21 210 77 64
<b>Owners</b>	Walmark AS, Czech Republic - 100%
<b>Top management</b>	Ana-Maria Mironescu - Finance Manager Catalin Vicol - Southeasten Europe Regional Director
<b>Main Products</b>	Food supplements

**Table 6 - Radix SRL profile**

<b>Name</b>	Radix SRL
<b>Date of establishment</b>	Oct 29, 1993
<b>Headquarters</b>	Bucharest, 21 Valea Cascadelor Str.
<b>Website</b>	www.radixplant.ro
<b>E-mail</b>	office@radixplant.ro; vanzari@radixplant.ro
<b>Phones</b>	+40 372 215200; +40 21 3060210
<b>Fax</b>	+40 21 3060211
<b>Owners</b>	
<b>Top management</b>	Nicusor Cirstoc - Director of Operations Liliana Bivolariu - Purchasing Manager
<b>Main products</b>	Food supplements

**Table 7 - Herbalife RO SRL profile**

<b>Name</b>	Herbalife RO SRL
<b>Date of establishment</b>	Apr 30, 2009
<b>Headquarters</b>	Bucharest, 1 Architect Louis Blanc Str.,7th floor, sector 1
<b>Website</b>	www.herbalife.ro
<b>E-mail</b>	marketing.ro@herbalife.com; ROOrderline@herbalife.com; DRRomania@herbalife.com
<b>Phones</b>	+40 800 800 478; +40 21 310 2410; +40 21 316 59 32/33
<b>Fax</b>	+40 21 310 2433; +40 21 311 21 99
<b>Owners</b>	Herbalife International Luxembourg Sarl
<b>Top management</b>	Hatrick Grant Eric Richard Goudis Romeo-Dan Cazanescu
<b>Main products</b>	-Vitamins and dietary supplements; -Protein shakes and snacks; -Energy and fitness drinks; -Skin and hair care products.

### 8. Forecasts

Our estimations on the Romanian food supplements market is to amount to RON 600 mln in 2013, a 12% increase year-on-year and RON 675.4 mln in 2014, a jump by 12.7% compared to a year ago. This will be a result of the growing demand for such products.

According to PMR Research, the new health claims regulation that defined a list of allowed health claims on food supplements' labels will not have as significant effect on the food supplements market as would have been anticipated. The regulation does not involve products that contain herb-based active ingredients and they could continue to be sold with the old labels. The majority of changes will influence small manufacturers and should result in a diminution of unfair competition.

Romania is expected to be the most attractive market in Central European region in the next three years compared to Poland, Bulgaria, Hungary, Slovakia and the Czech Republic, taking into consideration predicted market growth.

### 9. References and information sources:

#### European:

European Commission - <http://ec.europa.eu>

Association of the European Self-Medication Industry - [www.aesgp.eu](http://www.aesgp.eu)

European Food Safety Authority - [www.efsa.europa.eu](http://www.efsa.europa.eu)

Italian Food Law Association - [www.rivistadirittoalimentare.it](http://www.rivistadirittoalimentare.it)

#### Romanian:

Ministry of Health - [www.ms.gov.ro](http://www.ms.gov.ro)

*National Institute of Public Health* - [www.insp.gov.ro](http://www.insp.gov.ro)

Ministry of Public Finance - [www.mfinante.ro](http://www.mfinante.ro)

Leading companies' official websites:

[www.walmart.eu](http://www.walmart.eu)

[www.radixplant.ro](http://www.radixplant.ro)

#### Official media publications:

[www.wall-street.ro](http://www.wall-street.ro)

[www.nutraingredients.com](http://www.nutraingredients.com)

[www.capital.ro](http://www.capital.ro)

[www.mediafax.ro](http://www.mediafax.ro)

### **Disclaimer**

Whilst the information contained in this Profile has been given in good faith and every effort has been made to ensure its accuracy, AII Data Processing cannot guarantee the accuracy of this information and hereby expressly disclaims any responsibility for error, misinterpretation and any and all loss, disappointment, negligence or damage caused by reliance on the information contained in the Profile or any failure or alleged failure in the delivery of the Service referred to herein, or in the event of bankruptcy, liquidation or cessation of trade in any company, individual or firm referred to herein. Confirmation of the information accuracy should be sought from the establishments concerned. Unless otherwise stated, the copyrights and any other rights in all material on this site are owned by AII Data Processing. Use of this Profile is provided by AII Data Processing subject to the following Terms and Conditions:

1. Use of this Profile constitutes your acceptance of these Terms and Conditions which take effect when you first use this Profile. AII Data Processing reserves the right to change these terms and conditions at any time by posting changes on line. You are responsible for reviewing regularly information posted on line to obtain timely notice of such changes. Your continued use of the Profile after changes are posted constitutes your acceptance of this agreement.
2. Neither AII Data Processing nor other related parties, whilst endeavouring to provide 24/7 availability, will be held liable if for any reason the Profile is unavailable at any time.
3. Access to this Profile may be suspended temporarily or permanently and without notice.
4. Whilst AII Data Processing endeavours to ensure that the information on this site is correct and up-to-date, no warranty, express or implied, is given as to its accuracy and AII Data Processing does not accept any liability for error or omission.
5. Part of this Profile contains materials submitted to AII Data Processing by third parties. Third parties are responsible for ensuring that materials submitted for inclusion on this Profile complies with national and relevant international law. AII Data Processing can not guarantee the accuracy of this material and hereby expressly disclaims any responsibility for error, omission or inaccuracy in the material, misinterpretation and any all loss, disappointment, negligence or damage caused by reliance on the information contained in the Profile or any failure or alleged failure in the delivery of the services referred to herein, or in the event of bankruptcy, liquidation or cessation of trade of any company, individual or firm referred to herein. Confirmation of the information accuracy should be sought from the establishments concerned or from AII Data Processing upon explicit request.
6. AII Data Processing shall not be liable for any damages (including, without limitation, damages for loss of business or loss of profits) arising in contract, tort or otherwise from the use of or inability to use this Profile, or any data contained in it, or from any action or decision taken as a result of using this Profile or any such information.
7. AII Data Processing accepts no responsibility for the content of any site to which a hypertext link from this Profile exists. Such links are provided for your convenience on an "as is" and "as available" basis with no warranty, express or implied, for the information provided within them.
8. If any of these terms should be determined to be illegal, invalid or otherwise unenforceable by reason of the laws of any state or country in which these terms are intended to be effective, then to the extent and within the jurisdiction in which that term is illegal, invalid or enforceable, it shall be severed and deleted from the clause concerned and the remaining terms and conditions shall remain in full force and effect and continue to be binding and enforceable.
9. By accessing and reading any part of this Profile, you should have accepted these Terms in full.

### **Copyright**

All rights reserved. Downloads and print extracts of SeeNews – Research & Profiles content are allowed for personal and noncommercial use only. Re-publication or re-distribution of content, including by framing, is strictly prohibited without the prior written consent of SeeNews – Research & Profiles.

SeeNews – Research & Profiles and its logo are registered trademarks of AII Data Processing Ltd.

SeeNews 2014