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PASTRY CONSUMER PROFILE: AN INVESTIGATION ON CLUJ-NAPOCA MARKET

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ABSTRACT. Among other producers and (re)sellers of snacks and fast-food, bakeries and pastry shops are some of the most dynamic enterprises that have developed both at national level and at the level of Cluj-Napoca during the recent years. Given the great variety of such snacks, the authors aim at sketching the profile of the pastry consumer on the market of Cluj-Napoca. The results of two quantitative studies conducted online and face-to-face in 2013 and 2014 are analyzed. These results are considered to be relevant for the characterization of the local consumer. Another aspect that is covered by the present paper is that one concerning the supply side.

Keywords: pastry, bakery, fast-food, Cluj-Napoca, secondary data, quantitative research.

JEL Classification: L83

1. Introduction and Literature Review

The fast-food industry is one of the big winners of the global economic crisis. This fast-food phenomenon affects the entire world. For example, nearly 3,000 French restaurants and coffee shops went out of business and closed down in 2010. According to Bernard Picolet (the owner of a restaurant in Paris): "today's French people do not eat anymore like the French but like the Americans. Today's youth does not understand the traditional cuisine, or does not care about it. They prefer sandwiches and chips and when they go out they

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opt for clubs instead of restaurants. They have the most sophisticated phones but they have no clue how a *courgette* looks like. They know everything about the Internet but they do not know how to eat fish." [Negrescu, 2011]. Similar situations have occurred in countries like: Spain, Great Britain, Germany and Italy, where traditional restaurants were replaced by fast-food units. Even the Americans have begun to return to their old preference, despite their behavioral shift towards healthy foodservices, as national campaigns promoting healthy food have advised them [Negrescu, 2011].

According to the report published by GIA (Global Industry Analysts Inc.) cited by The Bakery Network [2013], the global market of bakery products is expected to reach the value of $ 447 billion by 2017; among the triggering factors of this forecast there are:

- the new consumer preferences, obviously oriented towards conveniently portioned and easy-to-consume bakery goods;
- the increasing migration from the rural to urban areas causing an increase in demand for convenience foods such as breads, pastries, cakes, and biscuits;
- the growth of deli and in-store bakery;
- the consumers' shift away from meat and packaged goods;
- donuts, specialty breads, pizza and gourmet pastry are among the fastest growing product categories;
- the manufacturers' focus on displaying and dressing their bakery products in order to increasingly attract today's discerning consumers.

The European Market

According to the most recent Gira Report [*Bakery Performance*] "bread holds a sovereign leading position on the European bakery market", accounting for around 80 % of all bakery products consumed within the EU and Turkey (which adds up to one third of the EU bread consumption). Moreover, the same report [*Bakery Performance*] reveals that an important share of the fresh bread consumption in countries such as Romania and Turkey still relies on daily deliveries of fresh industrial products to small stores.

The European supply of bakery and pastry products is quite well described by Verite Reily Collins [2013] who refers to the Bakers' Federation report: one third of the entire production (8 million tons) is produced by major producers, located mainly in Germany and in the UK (accounting for 60 % of the total plant production); France, the Netherlands and Spain produce another 20 % together; while the rest of the production is spread across other European countries. In Britain and Ireland 80 % of the supply

comes from industrial bakeries. Craft bakeries still have the major proportion of the market in the other European countries, although this situation is about to change. According to the same source, the supply consists of a very wide and rich range of products, such as: classic breads, specialty breads, artisanal bread, gluten-free foods and other catering products for consumers with allergies, whole grain products, frozen and ready-made pastry, ethnic breads, in-store bakery products, dinner party/catering extras, Christmas and/or Easter bakery products, etc.; the range extends to other segments, for example biscuits and crackers but also cereals and cookies.

Gira [2013, pp. 3-4] offers a more detailed classification of the bread, bakery and pastry products; thus, the following classification categories are taken into consideration:

- bakery products' differentiation at consumer level:
  - bakery products: *bread* (baguette, stick, rustic bread, buns, etc.), *viennoiserie* (croissant, chocolate rolls, Danish pastries, donuts, etc.), *patisserie* (cakes, muffins, tarts, cream pastries, etc.), *savory pastry snacks* (to be consumed hot: savory puff pastries, sausage rolls, baguette with topping, mini savory tarts), *biscuits* and *cereals* (the last ones excluded from Gira's reports);
  - production technology: *fresh* (un-packed or packed at the point of sales, shelf-life 1-2 days), *pre-packed long-life* (packed at industrial level, branded, shelf-life over 2 days) and *pre-packed for home-baking* (needs final baking/thawing at home);
- production methods:
  - *artisanal scratch production/on the premises* (mainly to be found at bakers' shops and in-store baking units in hypermarkets but can also be found in restaurants for patisserie);
  - *industrial production* (pre-packed long-life and home-baking, fresh finished, bake-off);
- distribution circuits:
  - *retail distribution* (artisan bakers, modern retail (including hard-discount stores), bakery chains (more than 10 sales outlets), "other retail": convenience stores, petrol stations and small grocery stores);
  - *catering sectors* (commercial catering: restaurants and hotels – independent and chains, transport, and social catering: education, workplace, health/welfare).

The same Gira report [2013, pp. 5-8] presents the consumption preferences of the European states (EU-27) registered in 2011 as it follows:

- the entire consumption of *bakery products* was of 40.1 million tons, adding up to € 126.4 billion;

- in terms of volume, *bread* accounts for 79 % of all bakery products consumed; the remaining percentages are split among: *patisserie* (10 %), *viennoiserie* (8 %), and *savory pastry* (3 %);
- consumption is dominated by *fresh* products, which represent 68 % of the entire market volume, followed by: *pre-packed long-life* products (28 %), and *pre-packed home-baking* products (4 %); *pre-packed* products and *savory pastry* are expected to lead to market growth until 2016;
- *industrial supply* provided accounted for 66 % of the consumed bakery products, distributed per categories[4]: *pre-packed long-life* products (28 %), *fresh-finished bakery* (19 %), *bake-off* products (14 %), and pre-packed home-baking (5 %); the remaining 34 % of the demand was covered by *artisanal providers*, being dominated by *artisan bakers* (30 %), followed by *in-store retailers* (3 %) and *other retailers & caterers* (1 %);
- ***the Romanian market*** is characterized by the following aspects:
    - ***bread*** accounts for nearly 80 % of the consumption, while ***other bakery products*** represent a little over 20 % of the market;
    - ***fresh products*** add up to a bit over 70 % of the market, while the remainder is covered by ***pre-packed products***;
    - ***industrial supply*** seems to account for around 70 % of the consumed volume, while ***artisanal manufacturers*** cover about 30 % of the market.

Frozen bakery represents an important part of all provided pastry and bakery products. In this respect, a closer look at its market provides interesting facts. Thus, according to the specialists of Euromonitor [Nieburg, 2012]:

- manufacturers can seize upon the underdeveloped frozen bakery market in Eastern Europe, the market being forecast to rise nearly 28 % by 2016, reaching € 80.2 million but they should keep in mind that economic development is the most important factor for frozen bakery;
- among the countries that generate high opportunities for such investments, there are: Slovakia, Bulgaria, Romania, Poland, Croatia and the Czech Republic; according to the cited source, these markets present better prospects because consumers are aware of frozen bakery, most women work and, consequently, do not have time to bake at home, and, therefore, sales are higher; on the other hand, these markets present the disadvantage of being saturated and of having powerful market leaders;

[4] Percentages refer to cooked weight [Gira, 2013, p. 8].

- Serbia, Macedonia and Hungary represent three other attractive countries for frozen bakery producers, as their population is known for its high consumption of baked goods;
- still, bread consumption is in decline in countries like Belarus, Hungary or Slovenia, where healthier bread substitutes are preferred;
- some European countries, such as Russia, Ukraine and the Caucasus nations, have a low penetration of retail chains, and, therefore, are less attractive, due to the reduced capacity of storing frozen food products;
- the Baltic countries, Belarus and Russia are well-known for their peoples' preference for dark/black/rye breads;
- throughout Europe, the small, local producers are the ones who dominate the market, as they manage to best understand the local consumers' needs and preferences.

Consumption Trends of Pastry and Bakery Products in Romania

If eating out (especially at a fast-food) was a luxury, today it has become more or less a need, especially during the lunch break; this is how Mohamed Murad [Negrescu, 2012], the owner of the fast-food chain, Spring Time, describes the Romanian market.

Romania has always been one of Europe's most important grain producers, and at the same time one of the countries with high demand for bread and pastry products. According to the data provided by the National Institute of Statistics [*România liberă online*, 2013], a Romanian consumes daily: over 500 grams of cereals (breads[5], bakery and pastry products being here included), nearly 300 grams of potatoes, 200 grams of vegetables, over 170 grams of fruits and nearly 50 grams of fats; these add up to a yearly consumption of: 200 kilograms of bread, nearly 100 kilos of potatoes, over 70 kilos of vegetables, around 60 kilos of fruits, and 18 kilos of fats, while they eat around 33 kilos of pork meat and only 4 kilos of fish.

Moreover, Viorel Marin considers that: "Romania is still a blessed country with its more than 12 million hectares of top-quality flatland. […] This potential combined with the constant high Romanian appetite for bread, bread specialties and pastry products can drive Romania to become quite a heaven for the milling industry" [Sosland, 2008].

Euromonitor's study "Global Consumer Foodservice: How the World Eats" revealed that, in 2009, food street sales registered the highest increase, by 9 % at global level, compared to the fast-food sector, that increased by 7 %, to the full-service restaurants which gained 5 %, to coffee shops and bars

[5] Of which, 400 grams are considered to be consumed as bread-loafs [*România liberă online*, 2013].

which advanced by 3 % or to the delivery/take away businesses which gained only 2 %. Although food street sale points only represented 21 % worldwide in terms of numbers of fast-food units, worldwide street-kiosk sales added up to $ 88.4 billion, placing them on the 4th rank in the global top of food-service operators [*Foodandbar.ro*, 2009]. The same institution, Euromonitor, revealed that during the same year, on the Romanian market there were 6,854 fast-food serving units, of which 832 (around 12 % of the total, almost 10 % of which belonged to Fornetti) were chain-affiliated and accounted for sales of $ 82.5 million, while 6,022 were independent and brought sales of $ 645.5 million [*Foodandbar.ro*, 2009]. Psychologists and doctors explain that fast-food consumption has increased as a consequence of the economic crisis, which has lead to the decrease of wages, and therefore to the consumers' need to reorient towards providers they perceived more convenient from the perspective of the price paid; moreover, fast-food products are associated with a higher level of trust granted to the products' quality [Negrescu, 2012].

Overall, during the past years, the fast-food industry has registered a positive development in Romania, despite the harsh consequences of the most recent global economic crisis. Due to their optimized quality/price ratio, to the quick serving time, and to the easy consumption, international chains and brands such as McDonald's, KFC, Fornetti or the simple standard bagel and donut shops, respectively the shawarma producers have managed to raise profits [Negrescu, 2012].

For example, in 2011, € 140 million entered the pockets of McDonald's, KFC and Burger King only on the Romanian market, these three restaurants having around 180,000 clients per day, with an average spending of € 2-3 per person [Negrescu, 2012]. Today, bagels seem to be just as profitable, because around 11.7 million Romanians, living in 213 towns and cities, eat bagels worth of approximately € 160 million per year [Kolbay, 2014].

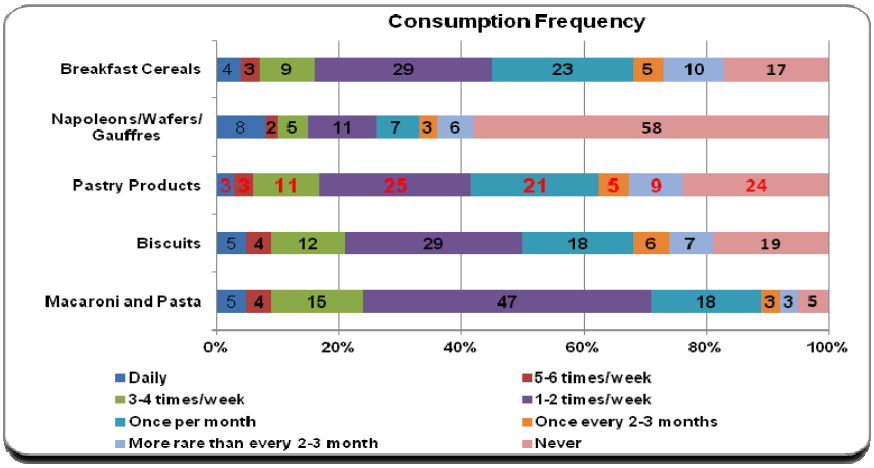
The main factors that determine Romanians to buy fast-food products do not differ from those well-known at global level: quickness, familiarity/ popularity, and price-convenience; to these, one may always add occasional whims or impulse products, respectively, pleasure foods [*Foodandbar.ro*, 2009].

Briefly, the Romanian pastry and bakery market can be described just like the international press perceives the one in Bucharest [F. N., 2014]. Thus, there are several options for a quick snack, which manage to satisfy the need for food in a similar way to the traditional fast-food serving units, although they differ from the concept. Among these, there are: bagel shops (Petru, Delissima, Gigi, Luca, etc), donut shops (Gogoașa Înfuriată, Fițoșica, etc), pie shops (yeasted oven-baked pies like Palaneț, Plăcintă Codrenească or oil-baked pies – Lángos), Kürtős kalács or Chimney cakes shops, pancake or

crêpes shops, bakeries and pastry shops (Fornetti, Panemar, etc.), sophisticated high-end/upper scale pastry shops (inspired by French products but more expensive); fast-food restaurants (Mc Donald's, KFC, Pizza Hut, Subway, Spring Time, etc), kebab and shawarma producers, pizza places, etc. They are either independent or chain affiliated, local and international brands enjoying similar popularity levels; some can be mobile units; the franchising system enjoys high popularity among the entrepreneurs in this food sector. Supermarkets and hypermarkets have also entered the fast-food sector, providing a wide range of products, from pastries and bakeries to cooked meat: basically everything that can be eaten on the spot, or taken away. Many of the providers manage to attract and capitalize tourist flows, too (this being the case of Romania's main tourist destinations, from seaside, spa and mountain destinations, to the country's main cities, as well: Bucureşti, Sibiu, Braşov, Cluj-Napoca, Timişoara, Iaşi, etc).

According to the data provided by NIS, 41 % of the Romanian's expenditures are destined to the food and beverage sector; further on, GfK Romania reveals that during the first quarter of 2014, nearly half of this amount (namely 48 %) was spent on *fresh food*; more exactly, food consumption was split as it follows: raw meat and meat products (35 %), milk and dairy products (20 %), vegetables (16 %), *bread, bakery and pastry products* (14 %), fruits (11 %), and eggs (3 %). Regarding the pastry and bakery products, Romanians tend to be more conservative, 69 % of the sales being made in traditional retail units/proximity stores/marketplaces/bakeries/pastry shops/specialized stores boutiques/kiosks/food stores (appreciated for: accessible prices, many and varied Romanian products, freshness and quality, respectively for the close and friendly relations established by the vendors with their customers), and only 31 % of the consumption occurring in modern retail units/supermarkets/hypermarkets [Vaschi, 2014]. Health related issues have begun to influence Romanian customers but they have not yet managed to contribute significantly to the decrease in demand for pastry and bakery products. Moreover, it seems that Romanians tend to be concerned about health-related problems only at a declarative level, rather than switching their eating behavior [Ionescu, 2014].

One of the most important researches dedicated to understanding the behavior of the Romanian bread and pastry consumers was conducted by RomPan in 2009, on a sample of 1,281 adults, making use of direct, face-to-face home-based surveys; the study had an acceptable margin of error of ± 2.8 %. The most relevant findings are presented in Graph 1, and in the lines below [RomPan, 2009, pp. 1-3]:



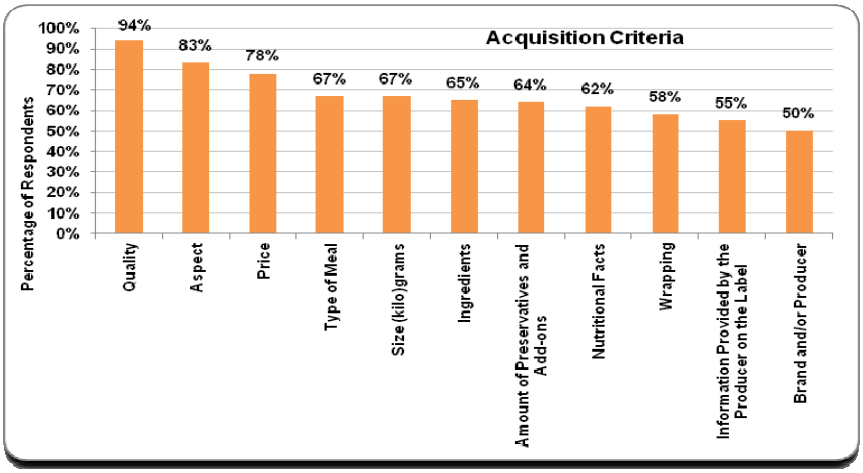
Source: RomPan, 2009, p. 3.

Graph 1. The Consumption Frequency of Pastry and other Granaries

- the most sought products are as follows[6]:
  - *pasta and macaroni* are consumed on e regular basis (by around 70 % of the adult population); split per categories, the preferred products are: spaghetti (70 %) and macaroons (68 %), followed by vermicelli (57 %), noodles (52 %), and snail-shaped pasta (49 %);
  - *biscuits* are also regularly consumed by 50 % of the adult population; among the preferred types, there are: plain/ simple biscuits (69 %), biscuits with filling (48 %), salty biscuits/crackers (43 %), and biscuits with frosting (29 %);
  - *bakery and pastry products* are consumed on a constant basis by a little over 40 % of the adult population; the most frequently bought products include: coffee cake made with a sweet yeast dough[7] (61 %), *fresh pastry (59 %)*, cakes and sweet rolls (46 %), pound cake[8] (39 %);
  - *breakfast cereals* regularly appear in the breakfasts of somewhat 40 % of the adult population; consumers turn towards: cornflakes and oat flakes, etc (34 %), expanded cereals (salty corn fluffs or sweet rice fluffs, etc (31 %);

[6] The underlined categories are the most relevant ones from the perspective of the undertaken research.
[7] The Romanian product is "cozonac".
[8] "Chec" in Romanian.

- the least desired products (bought by *less than 10 %* of the respondents) include:
    - tortellini, lasagna, penne, ravioli, cannelloni, and pasta with add-ons;
    - cereal candy-bars (simple or mixed with fruits);
    - *frozen pastry*;
- *home-made products* represent an important segment of the pastry supply; the respondents mentioned that they make at home their own:
    - *noodles* (37 % producing a monthly average of 1.3 kilos of noodles);
    - *coffee cake made with a sweet yeast dough* (55 % producing yearly about 7.8 kilos per household);
    - *pastry and bakery products* (60 % preparing 3 kilos/ month/house–hold, with a higher percentage in rural areas, of 66 %, compared to the urban residencies, 55 %);
- *acquisition habits* prove that most consumers opt for packed/wrapped goods;
- *the most important criteria considered when buying bakery and pastry products, respectively granaries* are: the quality (94 %), the aspect, the price, the type of meal, the size, the amount of preservatives and add-ons, the ingredients, the nutritional facts, the wrapping, the information provided by the producer, the brand and/or the producer (50 %), etc; a detailed presentation appears in the graph below (Graph 2);



Source: RomPan, 2009, pp. 4-5.

Graph 2. Criteria Considered for Pastry and other Granaries Consumption

- *among the main reasons why consumer buy low quantities of bakery and pastry products or refuse to buy them* (Table 1), there are: the fact that the consumer does not like the product; he/she cannot afford to consume such products or that the product is not healthy, respectively the consumer is not used to the product, or he/she has health problems that lead to the impossibility to consume certain products.

Table 1.

Main Reasons for Consumption Refusal

	Personal Health Issues	Lack of Money/Too Expensive	Not Healthy/Too Many Calories/Lead to Gaining Weight	Do Not Like the Products	Not Used to Consuming Such Products
Macaroni and Pasta	6%	5%	5%		
Biscuits		10%	11%	27%	
Pastry Products		**20%**		**11%**	
Wafers/Napoleons/ *Gauffres*	8%		13%	29%	
Breakfast Cereals		13%	25%		15%

Source: RomPan, 2009, pp. 2-3.

The City of Cluj-Napoca

Located in the North-West Region of Development, Cluj-Napoca/ Klausenburg/ Kolozsvár is often described as "The Heart of Transylvania". The modern city with ancient roots is one of Romania's most important municipalities, along with Bucharest, Timişoara, Iaşi, Braşov and Constanţa. According to the local authorities [Primăria Cluj-Napoca, *Cluj Business.ro*], Cluj-Napoca is a cosmopolite European city and a key business destination in South-Eastern Europe, a city with a remarkable potential for foreign investments. Moreover, just like in Transylvania's case, the medieval history has enriched the city with multiculturalism, one of its most important cultural features. Today, the municipality aims and attempts at becoming the second Romanian European Capital of Culture (after Sibiu, in 2007).

With a stable population of 309,136 persons (of which: 163,408 women and 145,728 men), the Cluj-Napoca is Romania's largest city, after the capital, Bucharest [NIS, 2011, *Census*].

The students enrolled at the 11 universities (more exactly, 6 public and 5 private ones) provide the city with a special sense of youth. Actually, it is considered to be one of the best places to study in, from this part of Europe

[Primăria Cluj-Napoca, *Cluj Business.ro*]. The students add up to roughly 80,000 persons, contributing to the local economy with nearly € 400 million [Oros, 2013], as they try to take advantage of the local highly diversified educational services aiming to prepare them for the matching career opportunities available to them. Obviously, authorities focus on transforming the city in one of the most welcoming cities in Eastern Europe, a great place to live and especially a great place to visit [Primăria Cluj-Napoca, *Cluj Business.ro*]. The well-developed academic environment also supports the provision of highly qualitative medical services that determine many Romanians to head towards its clinics in search for appropriate treatments and cures. While at national level, international arrivals generated by medical tourism are assumed to account for 6,500 arrivals (in 2013), accounting for expenditures related to medical purposes of around € 20 million [Stanciu, 2014], data concerning internal medical tourism are not available; still the number of medical tourism arrivals is significant.

Generally speaking, the local business environment is open and friendly and the community actively contributes to the city's growth. The local population, along with the large communities of students, combined with the important arrivals of patients together with their families and friends, constitute, for sure, a significant triggering factor for the consumption of pastry-related products, and, consequently, to the further development of this business sector at local level.

Thus, the decision to analyze the behavior of the pastry and fast-food consumers on the local market of Cluj-Napoca was taken based on the city's socio-economic characteristics, and on all of its distinctive features. Another reason that has determined this choice is the fact that there have not been identified any significant researches concerning neither the national market, nor the local one. Given the dimensions of this sector of the foodservices, the need for such a study was considered. The topic provides several future research directions, linked both to the pastry supply and demand sides, respectively to many management-related aspects that may and should be investigated.

2. Material and Methods

As pastry businesses are scarcely researched in Romania, and consequently in Cluj-Napoca, too, there are very few available data sources and researches concerning the behavior of consumers on this particular market.

Both the supply and the demand sides are researched in this paper. Thus, in order to be able to characterize the local pastry market, several official data sources were identified and consulted with the purpose of understanding this complex industry at global, European, national and local

levels. For this first analysis, the research method relied on secondary data analysis and interpretation. The supply side was described by processing the enterprises registered and verified by the Cluj County branch of the National Sanitary-Veterinary and Food-Safety Authority (NSVFSA), which authorizes the functioning of all the units that sell food (starting with kiosks and convenience stores, street-sellers, bakeries, pastry shops, specialized stores, super- and hypermarket food-court areas, respectively on-site bakeries, and ending with all the specialized public food-serving units, such as classic or specialized restaurants, bars and coffee shops, bistros, pastry shops and confectionaries, etc). The adopted work procedure consisted of merging all the available relevant lists, of successive crossings of enterprise names and addresses, respectively of verification dates, and, consequently, of excluding double occurrences or businesses that do not function anymore. The National Authority for Tourism is responsible with the registration and classification of all specialized food-serving units. Bakeries and pastry shops, together with confectionaries, are included in the fast-food category by NAT. The analyses have revealed an obvious gap in the official registration process. More exactly, despite the fact that according to the data provided by the Cluj County branch of the NSVFSA, regarding pastry shops and other specialized public food-serving enterprises, the number of such businesses is quite high, that of the registered and classified units is surprisingly low. Obviously, the responsible official public servants ought to be more thorough when verifying such units nation-wide.

Regarding the demand side, the present paper has been elaborated relying on two survey-based researches conducted in the late spring-early summer periods of 2013 and in 2014 at the level of Cluj-Napoca. The samples were non-probabilistic ones, determined based on statistical methods. The questionnaire elaborated in 2013 was also used in 2014; it included a number of 18 closed, multiple or single choice questions and 5 identification questions.

The two samples included 290 persons in 2013 and 321 subjects in 2014; both samples were by far dominated by women. This aspect is not considered an altering factor, as the other existing researches (few ones) that have covered similar problems have not indicated different behaviors among the two gender-related categories. Both samples are also consistent with the identified researches, in the sense that the large majority of the questioned subjects are adults. Once again, both samples are dominated by one category, in this case, that of the young students and pupils, who represented 66.2 % of the sample in 2013 and 54.2 % in 2014. Combined with the current occupation of the investigated sample members, the domination of the young generation and that of the pupils/students and employed students, respectively young

bachelor graduates in the second case, are perfectly consistent with the demographic situation of Cluj-Napoca, students included. Referring to the level of the last graduated educational institution, just like in the previous cases, two categories are dominant (the high-school graduates, due to the large number of students, and the bachelor graduates). The sample structure by incomes registers an interesting change from 2013 to 2014. It seems that the financial situation has changed in the case of the investigated persons, who more or less are similar in what concerns other features.

Moreover, in order to be able to properly characterize the demand side, and to, eventually, present a profile of the local fast-food, pastry and bakery consumer, statistical tests were run on the two databases built after the researches from 2013 and 2014. The Multifactor ANOVA test was run in order to determine if any of the next three factors (features of the respondents): their age, their occupation, and their monthly income determine any influences upon several consumption behaviors. The Appendix comprises the main results obtained. Further, for the cases in which influences occurred among the tested variables, cross-tabulations were run with the purpose of determining which intervals of the analyzed factors determine significant consumption patterns; their main findings are briefly described in the Conclusions section. Finally, the consumer's profile is described in the final lines of the paper.

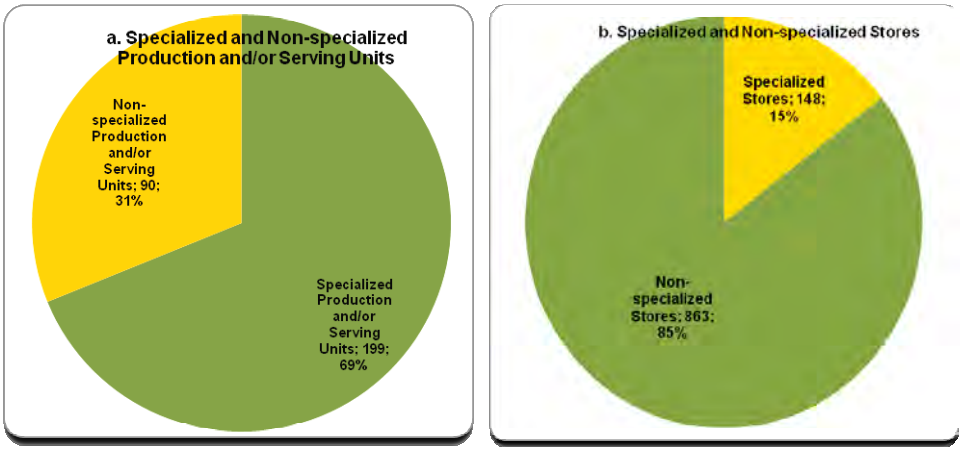
3. Results and Discussions

The Supply Side

The first part of this section is dedicated to the presentation of the bakery and pastry providers available in Cluj-Napoca. The analysis is carried out relying on the data gathered by the Cluj County branch of the NSVFSA, and according to how this institution has grouped the verified enterprises. The supply side is represented by two large categories of enterprises. On one hand, there are the producers of breads, bakery and pastry products, respectively of sweets. On the other hand, there are the resellers. Both categories can either be specialized or non-specialized units. A total number of 289 such units were identified in Cluj-Napoca.

Among the first type of providers (see Graph 3a for further details), one can identify a wide range of production units, of which, only those mainly focusing on pastry and bakery products were assimilated to the specialized category (totaling 199 businesses, and 69 %); this group consists of: units preparing and serving frozen pastry products, including bagels (57 units) and fresh pastry, breads and cookies (31), confectionary and pastry laboratories (59), pastries and bakeries (35), fast-food units serving pastries and/or

sweets, including mobile units (9) and pancake shops (8). The non-specialized production units (90 firms or 31 %) include those units primarily offering breads and bread specialties, and only secondary pastries (35 firms), the confectionaries and ice cream producers which, among other types of products, also offer pastries and bakeries (55 firms).



Source: Own calculations based on: NSVFSA, 2014.

Graphs 3a and b. Specialized and Non-specialized Production and/or Serving Units, Respectively Specialized and Non-specialized Stores

The second large category consists of the specialized and non-specialized resellers. Although much larger in terms of numbers of units, only a low percentage of all hyper- and supermarkets, general, mixed and convenience stores are, in fact, relevant from the perspective of pastry and bakery consumption. The chart above (Graph 3b) presents their distribution at the level of the city, where function a total of 1,150 stores, of which 139 are not relevant at all.

Obviously, the most relevant category is that of the specialized stores, comprising 148 units and representing 15 % of the analyzed units. Among these, there are stores specialized in the commercialization of bread and bread specialties, of pastries and bakeries (55 units), followed by: general stores, serving breads, bakeries and pastries (49 units) or serving fast-food (12 units); mixed stores (11 units); and confectionaries, sweets and pastries (9 units); there are also 12 kiosks. The largest category is that of non-specialized stores (with 863 units, representing 85 % in the total number of considered stores. Still, most, if not all, general food stores (792 units) and

supermarkets/food stores that also provide meat (18 units[9]), respectively mixed food stores (53 units), have at least their own bread section, if not a pastry and/or confectionary within the store; therefore, they may also account for some of the local pastry sales.

The analyses have led to the identification of several special cases among the most important (in number and size) pastry and bakery providers on the local market. The fact that the same company opens several stores (basically identical ones from the point of view of the provided goods and/or services) but registered under various more or less relevant categories makes it rather difficult to properly identify all of the pastry and bakery specialized providers active on this local market. Table 2 comprises the most relevant examples in this respect; Panemar and Agropan stand out by far; the upper-scale supply comes from businesses, such as the pastry shop Delice de France (located in Iulius Mall).

Table 2.

Special Cases of Breads and Pastry Providers

Company	Type(s) of Store(s) as Officially Registered	Number of Units
Agropan ProdCom	breads and pastry store, food store, specialized store for breads, specialized store for pastries and breads, bread store, and bread and bakery store;	22
Bewami Pan Expert	mixed store, bread and pastry store, and food store;	4
Brutăria Caromar	bread store, bread and pastry store, specialized store for breads and bakeries;	5
Dartim	food store and breads store	10
Panemar Morărit și Panificație	food store, food store with fast-food, specialized food store with pastries and bakeries, specialized food store with pastries, mixed store, breads and pastry store, respectively, bakery and pastry store	23
Pîinea pe Vatră	food store	2
Șapte Spice	food store	4
Gas Stations (Lukoil România, OMV Petrom Marketing, and *Rompetrol Downstream*	gas station store: food store, mixed store, and food store with fast-food	16
TOTAL		**86**

Source: Own calculations based on: NSVFSA, 2014.

[9] Unicarm supermarket is one of the most relevant examples.

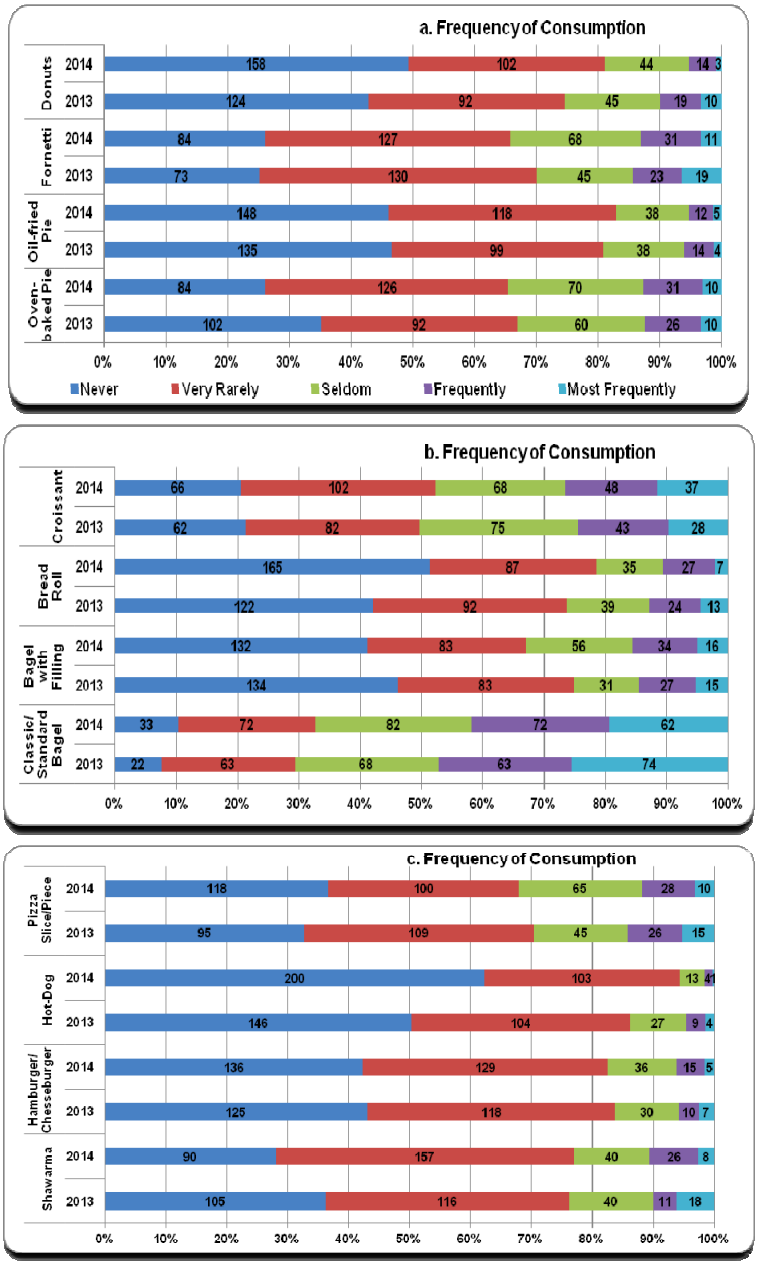
Moreover, the recent rebranding, and, consequently, the refurbishing of its stores, has also brought Napolact (a traditional dairy producer and provider) among the resellers of pastries and bakeries, somewhat aiming at competing against Panemar or La Casa, and, perhaps, trying to bring back to life the old concept of Miorița and Dorna stores.

Another relevant aspect related to the provision of pastry and bakery food-services is closely linked to the units authorized to function in this sector on the local market. By processing the data available in June 2014 [NAT, *Ranked Units*] a quite peculiar situation was discovered: the number of officially authorized units is very low compared to that determined based on NSVFSA [2014]! Thus, 217 fast-food units were identified but there seem to be no confectionaries and no pastry shops at all, only one fast-food with pastries and a single pastry-bar, although these two units are subject to official authorization by the National Authority for Tourism…

The Demand Side

The answer to the question "Do you consume fast-food or cold/hot snacks (pastry and bakery, donuts, sandwiches, Fornetti, pies, pizza or other such products)?" has constituted the starting point of the research. As expected, the percentage of snacks and fast-food consumers is very high, of over 90 % in both years (dropping from almost 98 % in 2013, to nearly 91 % in 2014). Still, although, the remainder declared that they do not consider themselves fast-food consumers, they continued by answering the questionnaire[10], proving that they do not necessarily associate pastry products to fast-food; clearly, they perceive these products to be snacks, and treat them as such. The respondents, who provided a negative answer to the first question, also declared that they never or almost never buy shawarma, hamburgers and cheeseburgers, hot-dogs, and even pizza slices but that they buy more or less often pies (oven-baked or oil-fried, donuts, bagels, rolls, Fornetti and croissants). Thus, they made it clear that they make a difference between pastry and what they consider to be fast-food products (for more details see Graphs 4a, b and c).

[10] These respondents were expected to quit fillining aut the questionnaire, as they had this possibility.



Note: the legend in graph a) is also valid for graphs b) and c).

Graphs 4a, b and c. Frequency of Consumption

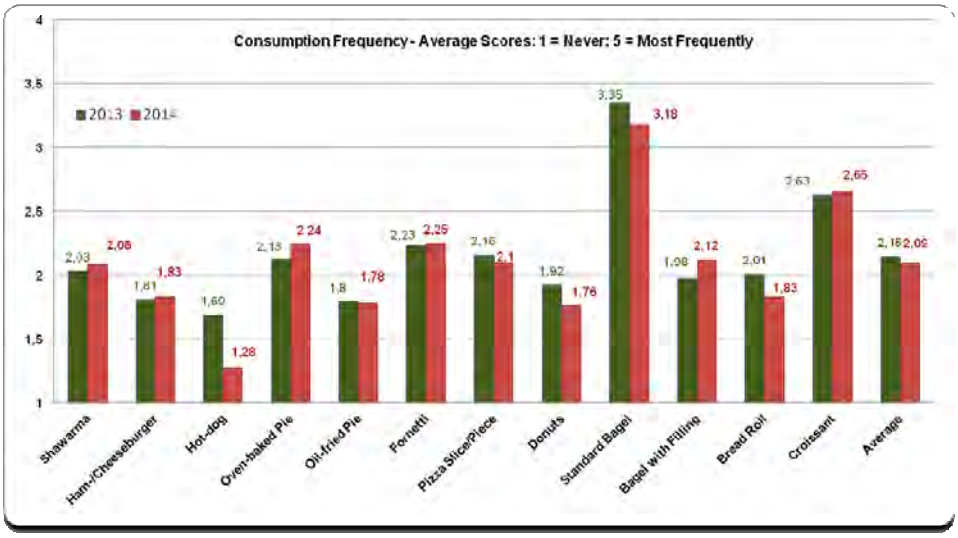
A brief analysis of the data presented in the set of three charts from above (Graphs 4a, b and c and Graph 5) leads to the following conclusions regarding the investigated samples:

- hot-dogs, hamburgers and cheeseburgers, respectively shawarma seem to be the least popular products among the respondents; these three categories register in both years the highest percentages in the cases of: never, very rarely and seldom consumed; in fact, only few of the respondents have declared that they buy such products frequently and very often;
- pizza slices/pieces are consumed somewhat more often but still the cumulated percentages of the relatively regular consumers is still low;
- obviously, it seems that pastry products are more popular among the respondents, being daily snacks;
- oil-fried pies and donuts (including pancakes, too) are the least frequently consumed pastry products, registering, in the case of relatively regular consumption, cumulated percentages pretty close to those of the pizza slices/pieces, although there obviously are different consumption motivations for the two types of products;
- oven-baked pies[11] seem to be consumed a little more often, compared to the previous types of products;
- similar consumption frequencies are registered for the classic or standard bread rolls, with poppy or salt, and for the bagels filled with olives, mushrooms, walnuts, chocolate or sausage;
- Fornetti products are among the pastries that used to enjoy a very high popularity in Romania, and which continue to be consumed relatively frequently; still, one may note the declining trend registered by their consumption frequency;
- somewhat more often, the respondents mentioned they buy croissants;
- finally, standard or classic bagels, with salt, poppy, sesame or with other seeds, are by far the most frequently consumed pastry products.

[11] This category includes the relatively new-market-entry, "palaneţ"; a popular yeast dough pie with various salty and sweet fillings, starting with the classic cabbage or cheese, and finishing with plums or apples etc.

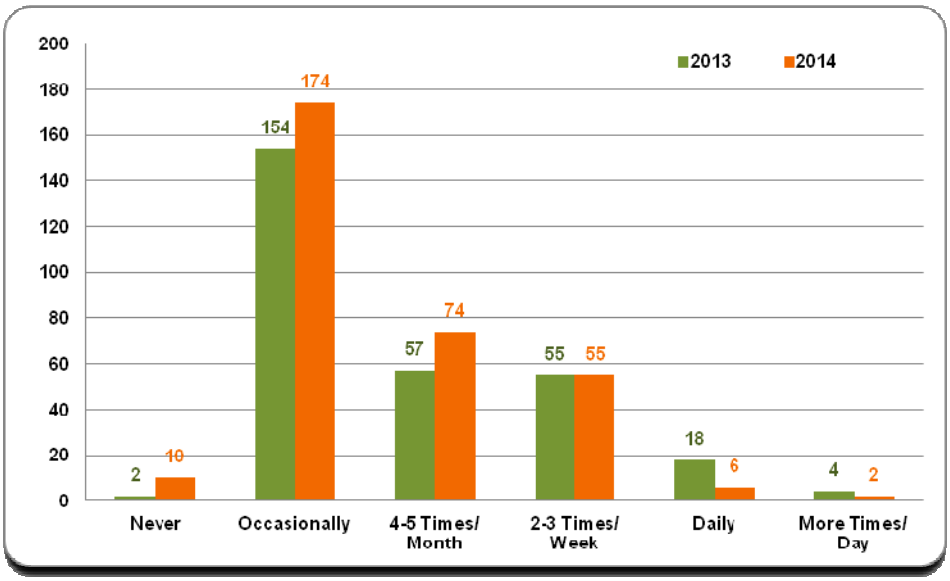
Graph 5.

Consumption Frequency of Fast-food Products (Average Scores)



Graph 6.

Frequency of Fast-food and Pastry Consumption

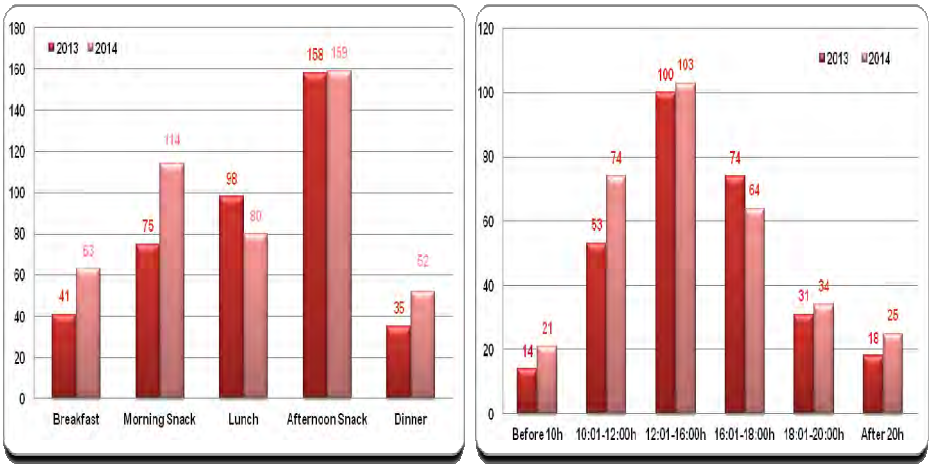


When asked how often they buy hot/cold snacks and pastry (Graph N° 6), most of the respondents declared that they consume such products occasionally (53 % in 2013 and 54 % in 2014) or 4 to 5 times per month (nearly 20 % in 2013 and 23 % in 2014); there is an important percentage of relatively regular buyers, who consume such products 2 to 3 times per week (almost a fifth of the questioned subjects in both years); the number of persons who buy daily, once or more times per day is not very high; at the same time, there has also occurred an increase in the number of non-buyers in 2014, compared to 2013. Altogether, it seems that these products are pretty much impulse-based consumed.

It is relevant to determine whether the products are consumed alone or together with complementary products. The analyses have led to the following findings:

- compared to the previous year, the percentage of respondents who are interested in consuming just the product itself has increased from 35 % to around 43 %;
- a constant segment of around 20 % of the consumers buy mineral water (still or with bubbles) together with their snack; this situation occurs during both of the analyzed years;
- a decline from 25 % in 2013 to around 19 % in 2014 can be observed in the case of the respondents who consume their snack together with soda or juice;
- tea and/or coffee are taken along with their product(s) by a constant percentage of the interviewed respondents (8 % in each year);
- finally, another constant quota of the consumers (some 12-13 %) take their product(s) with yoghurt or other dairy products. One of the future directions of research shall investigate the role of these products from the perspective of the consumers in the context of delaying or, even, replacing their breakfast, lunch or dinner.

Another significant aspect from the perspective of the consumers' profile is the preferred moment of consumption. Two questions were addressed in this respect. The first one invited the respondents to provide at most two answers concerning how they perceive their snack: a breakfast substitute, a morning snack, a lunch substitute, an afternoon snack, or a dinner substitute. The second question forced them to pick only one time-span, the one that describes best the moment when they usually buy pastry and fast-food products.

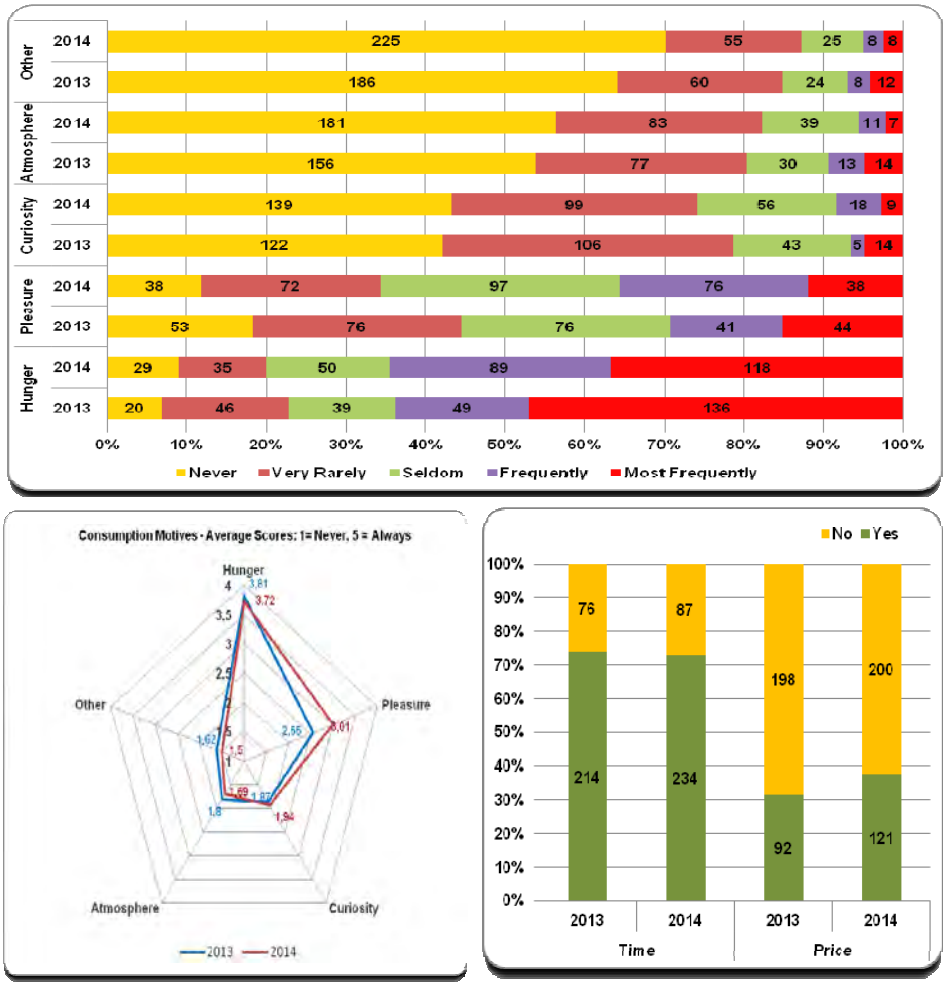


Graphs 7a and b. Preferred Moment of Consumption

The processing of the responses (Graphs 7a and b) has lead to the conclusions given below:

- most of the respondents (a constant number in both years) opt for buying and consuming such products in the afternoon, they perceive them as afternoon snacks and consume them especially after lunch and before 6 PM;
- a relatively high number of respondents assimilate these products to their lunch meals and morning snacks;
- an increasing number of persons skip breakfast at home, and opt for buying a take-along on their way to work;
- the number of consumers who buy such products for dinner is not to be neglected either. In this case, too, further researches shall investigate the role of these products from the perspective of the consumers' habits regarding their breakfasts, lunches or dinners.

Obviously, the decision of buying and eating fast-food and pastry products is taken as a consequence of certain triggering factors; and their determination is essential for establishing the profile of the consumer. Three different questions were addressed in order to determine the main motives for which the respondents opt for such products (Graphs 8a, b and c).



Graphs 8a, b and c. Triggering Factors of Consumption

It becomes clear that the most important factor that determines the respondents' consumption is hunger, with a constant average score of almost 4 points (3.81 in 2013 and 3.72 in 2014). Pleasure also plays an important role in the decision to buy such products, as most consumers tend to buy snack just because they enjoy eating them; compared to the previous year, the average score has increased by half of a point. Curiosity, the atmosphere and other factors do not seem to be high consumption determinants. The lack of time (with a constant percentage of 73 % in both years) seems to be another very

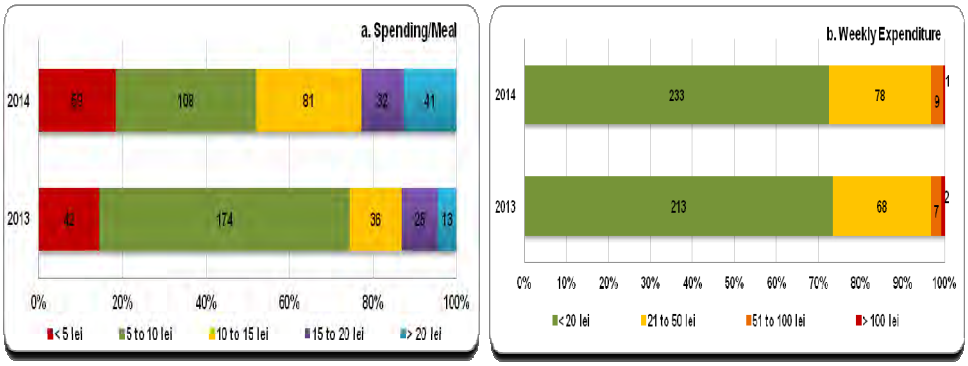
important triggering factor of fast-food and pastry consumption. Moreover, despite the general assumption and opinion that fast-food products are bought because people believe that they are cheaper; the interviewed persons have denied this idea in high proportions of nearly 70 % in 2013 and some 62 % in 2014. Altogether, the quickness of the service seems to be more important than the price.

When it comes to the preferred tastes, there do not occur any changes from one year to another. Thus, nearly 40 % of the respondents buy salty products; another 40 % opt for both salty and sweet products (usually buying both types); a lower percentage of the respondents do not seem to care if their snack is salty or sweet (16 %); and only a very low quota of the respondents (some 4 %) only buy sweet snacks.

Other two questions were designed with the purpose of finding out if the consumers are loyal to a brand or if they are rather convenience-oriented, respectively to determine where they purchase their snack from. Around 35 % of the respondents are convenience-oriented and, therefore, buy their snacks from providers who are on their way to work/faculty/school/home; to these, one may also add those more than 20 % of the interviewed persons who buy the products from locations placed nearby their offices/workplaces/faculties/ schools (25 % in 2013, slightly declining to some 21 % in 2014). A significant percentage of 35 % in 2013, increasing to almost 40 % in 2014 of the respondents are brand-loyal. The rest of the respondents consume whatever product they run into, without caring much neither about the brand, nor about the place of acquisition. Related to the type of provider, preferences have changed in 2014, compared to 2013, in the sense of an increased orientation towards specialized units and pastry shops located in down-town areas (increasing from 45 % in 2013 to 63 % in 2014), while all of the other providers have registered decreases. Thus, specialized producers and pastry shops located in malls, hypermarkets and supermarkets represent the second preferred acquisition place. Food kiosks and other similar units just like general food stores seem to be least preferred among the investigated samples.

A constant percentage of some 85 % of the respondents buy the products for themselves, followed by other 8 % who buy the products to be consumed later, with their families (perhaps at home); the rest of the persons are split among buying for their children or for other persons. Further on, with few modifications, most of the respondents either consume the products on the spot (with a slight decline from nearly 62 % in 2013, to close to 58 % in 2014 for the considered samples) or at their workplace/at the faculty/at school (with a moderate increase from almost 26 % in 2013, to nearly 30 % in 2014). Only some 10 % consume the products at home in 2014 (compared to 11 % in 2013). The rest indicated other situations.

Allotted budgets are essential in any attempt to sketch the consumers' profile. The two charts from below (Graphs 9a and b) provide information regarding both the customers' spending per meal, respectively the budgets they allot on a weekly basis.



Graphs 9a and b. Budget Allocations

A brief analysis of the data available reveals that, despite the fact that for the investigated samples weekly budgets have not suffered significant changes from 2013 to 2014, when it comes to the respondents' spending per meal there occur some noticeable modifications:

- an increase in the quota of the persons spending up to 5 lei per snack (by 3 %, compared to 2013);
- a visible decrease of the persons who allot amounts between 5 and 10 lei per meal, from 60 % in 2013 to 33 % in 2014;
- at the same time, a significant increase has also occurred in the percentage of the people who spend 10 to 15 lei per snack (from a little more than 12 % in 2013 to over 25 % in 2014);
- altogether, the cumulated percentage of the persons spending more than 15 lei per meal has increased from 13 % in 2013 to nearly 23 % in 2014.

The further development of the market is closely linked to two aspects: the expectations of the consumers, on one hand, and the capacity of the providers to innovate and to accordingly respond to their customers' needs, on the other hand. Having this in mind, two last questions were addressed. The first question concerns the respondents' opinion regarding the providers' capacity to positively surprise them with one or more appealing products(s). The answers received are quite peculiar, in the sense that the very large majority replied "yes" (80 % in 2013 and 90 % in 2014), while – as

already shown above – curiosity has proven not to be an important triggering factor for the investigated consumers. Finally, regarding what other types of fast-food and pastry products they would like to find on the market, the respondents seem not to be consistent from one year to another, their desires being more or less linked to market-"fashion". While muffins together with bagels (both, with various fillings) seem to have been the hit of last year, it looks like this year taco and tortilla, together with oven-baked pies with different fillings, would manage to raise the interest of potential customers. On the other hand, oil-fried pies and pancakes, donuts and Fornetti with other fillings and flavors seem to be on a declining trend. Moreover, although not very educated in this sense, the respondents seem to be more health-aware, and also tend to look for what they call healthier food, namely – salads and fruit.

An analysis of the results obtained for the multivariate ANOVA tests run on the available responses (Appendix) leads to conclusions such as:

- *the age*, as a factor, influences the consumption frequency of shawarma, hamburgers/cheeseburgers, hot-dogs and of croissants; moreover, the cross-tabulations run on the data collected have also revealed that the age groups of 20-25 years and 26-35 years are the most influential in this respect, these being the most important consumers of this type of products; still, one should note that there is an important segment of non-consumers, too;
- *the age* also seems to influence the perception upon two potential triggering consumption factors: lack of time and reduced costs; in this sense, once again the same age groups (20-25 years and 26-35 years), completed by that of the 36-45 year old persons determine:
    - on one hand, the highest number of respondents who consume such products due to their lack of spare time;
    - and, on the other hand, it is interesting to note that the same respondents are responsible for the denial of the association consumption due to a presumed low cost; moreover, not even the 14-19 years old respondents, who have limited budgets, do not agree with such associations;
- *the occupation* is correlated to the consumption of oven-baked products, in the sense that the category pupil/students is the most representative one, registering the highest rates among the respondents who *never consume* or who *consume very rarely* this kind of product; they also have the highest occurrences in the cases of the *occasional and frequent* consumers; the employees working in private enterprises constitute the most important segment of *very frequent* consumers;
- *the monthly income* generates influences upon the consumption of: hamburgers/cheeseburgers, Fornetti and croissants; in this respect,

lower income levels are associated to high percentages among *non-consumption* or *very rare consumption* in the case of hamburgers/ cheeseburgers as opposed to the situation of Fornetti, where: higher budgets are associated to low levels of consumption, respectively low budgets lead to frequent consumption; in the case of croissants, low budgets determine low levels of demand, and higher budgets lead to increased consumption;

- *the monthly income* also influences the budgets allotted per meal; in this respect, once again, lower and average income levels generate the most influences upon consumption behaviors; thus, the first three income groups (< 350 lei/month, 351-750 lei/month and 751-1.000 lei/month) are associated to most of the budget groups allotted per meal (< 5 lei, 5-10 lei, and 10-15 lei).

4. Conclusions

A brief summarization of the main findings of the conducted research may lead to the following conclusions, valid for both of the analyzed years:

- pastry and bakery products, respectively fast-food, are very popular among the permanent and temporary population of Cluj-Napoca;
- from the perspective of the consumption frequency:
    - the most commonly bought pastries and bakeries are: classic or standard bagels (the most popular) and croissants;
    - these products are followed by: filled bagels, Fornetti products, and oven-baked pies;
    - finally, among the least preferred bakery and pastry products, there are: oil-fried pies, donuts, and bread-rolls;
    - fast-food products, such as: mini-pizzas or pizza slices/pieces enjoy a higher consumption rate compared to that of shawarmas, hamburgers/cheeseburgers and hot-dogs (which are by far the least consumed products);
- for most of the respondents, pastries and fast-food products are *occasionally* consumed, being perceived as impulse food, respectively relatively regularly, but with low frequency (*once a week* to at most *2-3 times per week*);
- usually, the respondents (in almost half of the cases) consume only the product, without associating it with anything; around a fifth of the consumers also buy mineral or still water with their snack; the combination with dairy products or with soda, tea or coffee occurs in relatively constant quotas of no more than 10 % of the population;

- it looks like such products are most commonly consumed as lunch-time or afternoon snacks;
- hunger is the main triggering factor of consumption; it is followed by pleasure, which again allows the association with impulse-based consumption; another important factor is the lack of time, and thus the need to consume something that is not sophisticated and which does not involve a lot of time; on the other hand, the relatively low prices associated to these products do not increase consumption frequency;
- most of the respondents (the large majority) opt for salty products, respectively for salty and sweet products, consumed together;
- consumption is rather associated to convenience (in the cases of some 55 % of the respondents) but, at the same time, nearly 40 % seem to be brand-loyal;
- regarding the preferred type of provider, most customers (nearly 65 % in 2014) orient themselves towards specialized units and pastry shops located in down-town areas, followed by the ones opened in shopping centers (around 25 % in 2014);
- for the large majority, pastry products and fast-food are bought with the purpose of self-consumption (some 85 % of the respondents); moreover, these products are either consumed on the spot (about 60 %) or at the workplace/in school/at the faculty (close to 30 %);
- the average allotted budget per meal is between 5 and 15 lei for most of the respondents; there is also an important number of consumers who spend less than 5 lei per snack; the figures are consistent with the preferred products;
- finally, although curiosity does not motivate very much the respondents to consume, very many of them (nearly 90 % in 2014) have mentioned that they would be interested in tasting new products; one of the further developments of this market may be found in the area of the "healthy food segment".

The distribution of the results reveals that the largest age group (26-35) is also the most visible when it comes to the general consumption frequency of fast-food and pastry products. They are by far the most representative group among the persons who consume fast-food and pastry products: *occasionally*, *4 to 5 times per month*, *2-3 times per week*, and, even, *daily* in 2013, respectively *occasionally*, *4 to 5 times per month*, and *2-3 times per week* in 2014. This is also how the respondent's age influenced the consumption frequency of fast-food and pastry products. All other age groups contribute to the *occasional* consumption of this kind of food products, respectively to a relatively regular consumption of *4-5 times per month* (or *once a week*) among the respondents belonging to the 26-35 years interval.

The analysis of the results obtained for the multivariate ANOVA tests and for the cross-tabulations run on the responses obtained leads to several conclusions. A first one reveals that age influences the consumption frequency of shawarma, hamburgers/cheeseburgers, hot-dogs and croissants, two age groups (20-25 and 26-35 years) being the most influential in this respect. Further, the respondents' age also influences the number of consumers who buy such products due to the lack of spare time but at the same time, the same consumers do not associate the low price to consumption triggers (three age groups being most relevant in both cases: 20-25, 26-35 and 36-45 years). Pupils and students seem to be the most important representatives of the non-consumers or low-frequency consumers of oven-baked products, while the employees of private enterprises are the most frequent consumers of such products. Regarding the influence of the income levels upon consumption, the analyses revealed that lower income levels are associated to high percentages among non-consumption or very rare consumption in the case of hamburgers/cheeseburgers as opposed to the situation of Fornetti, where: higher budgets are associated to low levels of consumption, respectively low budgets lead to frequent consumption in the case of croissants, low budgets determine low levels of demand, and higher budgets lead to increased consumption. Finally, the monthly income of the respondents also influences the budgets allotted per meal, in the sense that the lower the monthly income, the lower the allotted budget for cold/hot snacks and pastries.

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Appendix

Results Obtained for Multivariate ANOVA Tests Run on the Data of 2013 and 2014 (*P*-Values)

Years	2013			2014		
Independent Factors / Dependent Variables	*P*-values			*P*-values		
	Age	**Occupation**	**Monthly Income**	**Age**	**Occupation**	**Monthly Income**
1. Consumption Frequency of Fast-Food and Pastry Products	0.0026	0.8117	0.2130	0.0707	0.7824	0.7678
2. Consumption Frequency of:						
Shawarma	0.0001	0.4517	0.2713	0.0310	0.9474	0.9552
Hamburger/Cheeseburger	0.0003	0.3944	0.0154	0.0403	0.7449	0.6010
Hot-dog	0.3075	0.7821	0.3828	0.0230	0.8059	0.1618
Oven-baked Pie	0.1545	0.0351	0.9234	0.6620	0.7911	0.0687
Oil-fried Pie	0.4919	0.5483	0.2352	0.4225	0.3693	0.9221
Fornetti	0.2060	0.2504	0.5146	0.3282	0.4095	0.0110
Pizza	0.1287	0.5473	0.6593	0.6731	0.3788	0.2961
Donuts	0.5574	0.2660	0.4997	0.0735	0.4872	0.1964
Standard Bagel	0.5896	0.7927	0.1532	0.8399	0.9038	0.2142
Filled Bagel	0.5516	0.0549	0.6053	0.2688	0.8993	0.3458
Bread-roll	0.2320	0.1140	0.5895	0.2500	0.5122	0.1218
Croissant	0.0315	0.6267	0.0068	0.0884	0.7932	0.3258
3. Preferred Combinations (consuming the product with or without other products)	0.2391	0.3026	0.2827	0.4253	0.6264	0.4280
4. Consumption Reasons:						
Lack of Time	0.3454	0.3434	0.8228	0.0120	0.3161	0.4492
Reduced Cost	0.2386	0.6296	0.5663	0.0067	0.9103	0.6444
5. Place of Acquisition						
Provider Choice	0.2109	0.1470	0.6264	0.9749	0.7771	0.2146
Provider Location	0.9681	0.3832	0.7352	0.7635	0.5336	0.5451
6. Budget/Expenditure Allotted per Meal	0.1115	0.0994	0.0109	0.4604	0.7218	0.9161

Note: Significant values (*P*-values < 0.05) are highlighted.