

WILLIAMS&MARSHALL STRATEGY

GLOBAL MARKET INSIGHTS

Demo version of the report

# Romania: Smoked Salmon Market

September 2017

Market research

## Report overview

This report presents a strategic analysis of the smoked salmon market in Romania and a forecast for its development in the next five years. It provides a comprehensive overview of the market, its dynamics, structure, characteristics, main players, growth and demand drivers, etc.

The purpose of the report is to describe the state of the smoked salmon market in Romania, to present actual and retrospective information about the volumes, dynamics, structure and characteristics of production, imports, exports and consumption and to build a forecast for the market in the medium term. In addition, the report presents an elaborate analysis of the main market participants, the price fluctuations, growth and demand drivers of the market and all other factors, influencing its development.

This research report has been prepared using the unique WMStrategy's methodology, including a blend of qualitative and quantitative data. The information comes from official sources and insights from market experts (representatives of the main market participants), gathered by semi-structured interviews.

### **The report on the smoked salmon market in Romania includes:**

- Analysis and forecast for the economy and demographics of Europe;
- Analysis and forecast for development of the market volume (market size), value and dynamics;
- Market breakdown (by origin, by product types, etc.) in both volume and value terms;
- Volume, dynamics and analysis of domestic production (past, current and future);
- Analysis of price levels (wholesale, retail, distributors, etc.) and their dynamics (past, current and future);
- Volume, dynamics and analysis of imports (past, current and future);
- Volume, dynamics and analysis of exports (past, current and future);
- Volume, dynamics and analysis of consumption (past, current and future);
- Value chain analysis and structure of price formation;
- Analysis of the factors, influencing the market development (market growth drivers, restraints, recent state programs, etc.);
- Characteristics of the main market participants (manufacturers, distributors, wholesalers, retailers, importers, exporters, Governmental structures, etc.) and the competitive landscape;
- Market shares of the main players on the retail market;

- Main distribution channels for the retail sales of smoked salmon in Romania;
- Analysis and forecast of the trends and levels of supply and demand on the market;
- Analysis of the major trade flows;
- Forecast for market development in the medium term (including three possible scenarios for development).

**Brief overview of the used methodology:**

- Analysis of official statistical information;
- Semi structured interviews with market experts;
- Semi structured interviews with corporate clients of the market;
- Analysis of information, received from the main market participants;
- Analysis of secondary information from official sources;
- WMStrategy's own methodology.

**The report contains information on the following products:**

- Smoked salmon:
  - By packaging:
    - Canned smoked salmon;
    - Smoked salmon in pouches;
  - By brand value;
    - Low-priced brands;
    - Retailer private brands (retailer's brands);
    - Known brands;
  - By origin;
    - Wild salmon;
    - Farmed salmon.

**The report covers the following countries:**

- Romania.

**The report covers the following companies:**

- Producers and traders:
  - The leading manufacturers in the country;
  - Other companies can be added at no extra charge based on your specific requirements.
- Retailers:
  - Auchan, Auchan Group;
  - Carrefour, Carrefour S.A.;

- Cora, Ahold Delhaize Group;
- Real, Metro AG;
- Kaufland, Schwarz Group;
- Billa, Rewe Group;
- Penny Market, Rewe Group;
- Mega Image, Ahold Delhaize;
- Metro Cash & Carry, Metro AG.

The list of companies, covered in the report can be amended and updated, based on your exact requirements!

**This report will allow you to:**

- Quickly and cost-effectively get a strategic analysis and gain competitive intelligence about the market;
- Track market data, including size, value, segmentation, forecasts, dynamics and structure – past, present and future;
- Explore and identify new market opportunities within the market;
- Track and identify key market trends, opportunities and threats and key drivers behind recent market changes;
- Strategically assess market growth potential, demand drivers and restraints on the market;
- Evaluate the key macroeconomic and demographic indicators to get insight into the general trends within the economy;
- See how the market performed in the past (over the last 5 years) and how it will perform in the future (in the next 5 years);
- Get acquainted with the leading companies on the market and their strategic position;
- Evaluate how diversified the market is in terms of competitive intensity, fragmentation and environment and understand competitive threats;
- Empower your marketing, branding, strategy and market development, consumption and supply functions with useful and actionable market insights;
- Build your investment strategy by assessing market attractiveness or company attractiveness;
- Build your own market entry or market expansion strategy or evaluate your current strategy;
- Add value to pitches and presentations by using official and accurate data and calculations.

This report is 75% ready and when complete will consist of more than 100 pages. The report will be updated as of the current month of purchase. It can be amended based on your specific requirements in order to meet your individual objectives and information needs.

If you are interested in the smoked salmon market in Romania, this research report will provide you with a strategic analysis of the market, its recent and future development. In addition, the report will save you time and money while presenting you all the necessary information and actionable insights, empowering you to make informed decisions and move your business forward!

## Research methodology

The report on the Romanian smoked salmon market uses the unique WMStrategy's research methodology that combines quantitative and qualitative analysis.

### 1. Analysis of official statistical information

This report includes analysis of official statistical information from different public and private sources. The information is used for the interpretation and analysis of data on the volume and dynamics of different quantitative indicators. In the same way, the information is used as basis for building forecasts for the dynamics of the quantitative indicators for the next few years. The exact list of used sources of official information is available in the full report!

### 2. Analysis of information, received from the main market participants

The collection and analysis of information, received from the main market participants is done mainly to understand their competitive positions on the market, to define and assess how different pricing and promotional strategies are utilized on the market and what competitive advantage each of them gives. This information is also used to analyze the assortment and brand presence on the market. The information, received from the main market participants includes company presentations, annual reports, price lists, promotional materials, proposals, etc.

### 3. Analysis of secondary information from official sources

The analysis of secondary information from official sources is used to make the picture of the market complete and full. The data is also used to verify the quantitative analysis and to enrich the qualitative one. Such information includes data from industry portals and

publications, trade associations, media agencies, articles and reviews, marketing agencies, commercial databases, WMStrategy's own research studies, and more.

#### 4. Semi structured interviews with market experts

Collection and analysis of qualitative information is used to explain different trends, growth drivers, volatility, threats and opportunities of the market. The collection of qualitative information is done through semi structured interviews with market experts. As market experts are considered representatives of the main market participants – manufacturers, distributors, wholesalers, retailers, importers, exporters, unions, professional associations and special publications, whose work is directly related to this particular market on a daily basis. The format of the semi structured interviews allows us not only to cover the main questions we need to ask in order to understand the logic behind the market, but also to get new insights and to allow new ideas and factors to come into the picture. During the semi structured interviews, the market experts are asked about their views on the future of the market, which are taken into consideration while preparing our forecasts for development. The exact list of interviewed experts is available in the full report or upon request!

#### 5. Semi structured interviews with corporate clients of the market

Another way of looking into the specific market is through the point of view of the corporate clients. In this phase of the research, we are using semi structured interviews to understand the perspective of the high-volume clients on the market. This allows for unmatched wide and deep industry understanding.

#### 6. WMStrategy's own methodology

The own methodology of WMStrategy can be found in every step of preparing our research studies from the methodology through the processes of collecting and analyzing information to drawing conclusions from it.

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About us

This report is 75% ready and is in completion stage. The structure and the contents of this report can be amended based on your specific requirements and goals. The report will be updated as of the current month of purchase. The final version of the research report will be presented up to 5 working days after your order. If you purchase the Corporate License, you will get an Excel sheet with all the quantitative information in up to 2 working days after your purchase. Feel free to contact us for more information!

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## 2. Executive summary

The Romanian smoked salmon market showed ... dynamics in physical terms in the period 2012-2016. In 2012, it was equal to X thousand tons. In 2012, the indicator ... by X%, after which followed three consecutive years of ... It happened at rates of X%, X% and X%, respectively. So, in 2016, the market volume reached ... for the period at ... thousand tons, which was an overall ... for the period. In the next few years, experts believe that the market will continue ... at rates of X% per year.

In value terms, the smoked salmon market in Romania showed ... dynamics to the same indicator in volume terms. In 2012, it was equal to X billion EUR...

...

**Table 1 Key indicators on the Romanian smoked salmon market in 2012-2016**

Indicators	2012	2013	2014	2015	2016
<b>Market volume and value in Romania</b>					
in tons	X	X	474	X	X
in 000's of EUR	X	X	X	X	X
<b>Volume and value of production in Romania</b>					
in tons	188	X	X	X	X
in 000's of EUR	X	X	X	X	X
<b>Volume and value of imports to Romania</b>					
in tons	X	X	X	X	X
in 000's of EUR	X	2,504	X	X	X
<b>Volume and value of the Romanian exports</b>					
in tons	X	X	X	X	X
in 000's of EUR	X	X	X	X	X
Share of domestically produced goods on the market, in volume terms	X%	X%	X%	X%	X%
Share of foreign products on the market, in volume terms	X%	X%	X%	X%	X%
<b>Average prices on the domestic market</b>					
Average producer prices, in EUR/ton	X	11,586	X	X	X
Average retail prices, in EUR/kg	X	X	X	X	X

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

## 6. Overview and analysis of the smoked salmon market in

### Romania

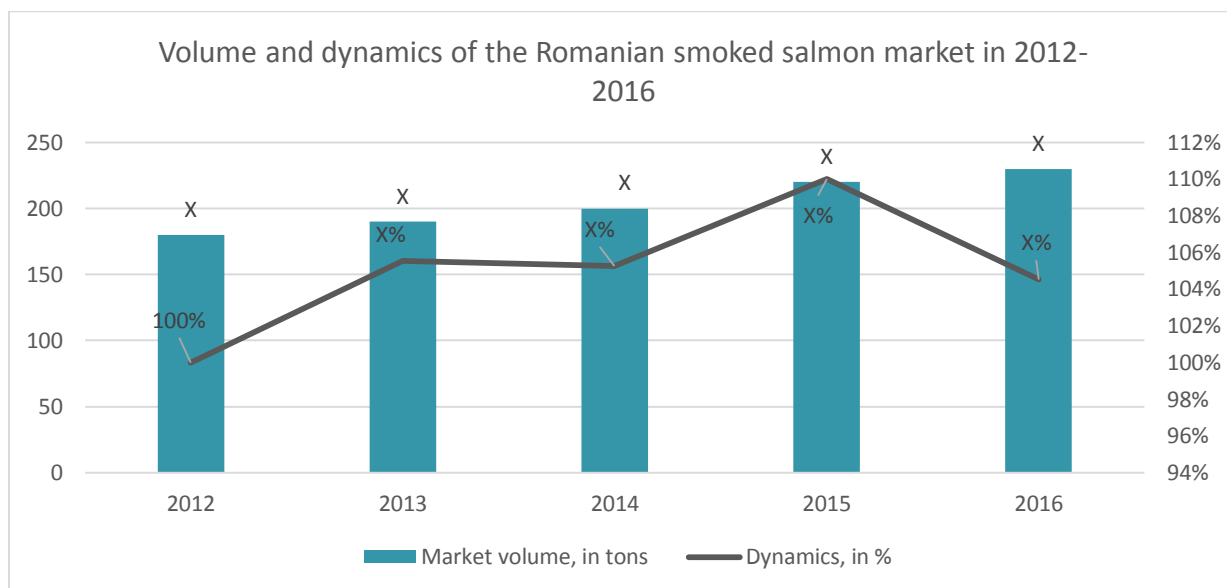
#### 6.1. Volume, value and dynamics of the smoked salmon market in Romania in 2012-2016

The Romanian smoked salmon market showed ... dynamics in physical terms. In, 2012 was equal to ... tons. In the next few years, it ...

**Table 2 Volume and dynamics of the smoked salmon market in Romania in 2012-2016, in tons and in %**

Year	Market volume, in tons	Dynamics, in %
2012	X	X%
2013	X	X%
2014	474	X%
2015	X	X%
2016	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)



**Fig. 1 Volume and dynamics of the smoked salmon market in Romania in 2012-2016, in tons and in %<sup>1</sup>**

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

...

<sup>1</sup> Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

### 6.3. Structure of the smoked salmon market in Romania by origin

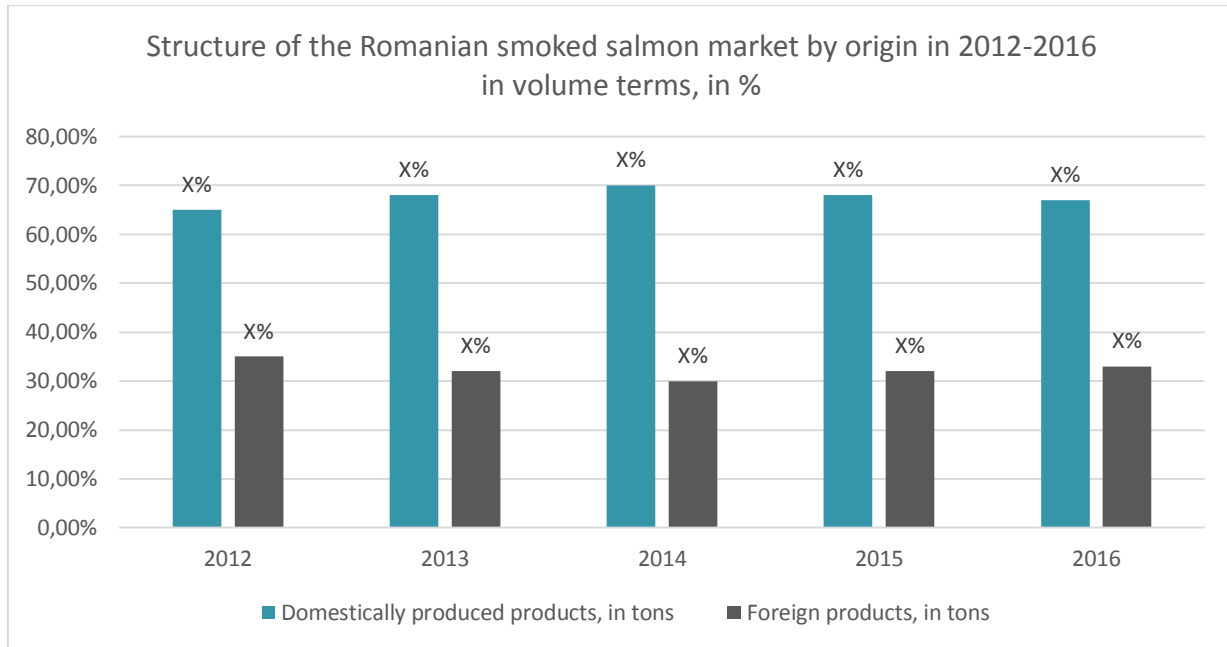
During the whole analyzed period, the market was dominated by products of ... origin in both volume and value terms. In physical ones, the domestically produced products accounted for X%-X% of the market in 2012-2016. The market structure fluctuated a bit throughout the years, but showed similar dynamics in value terms as well. The share of domestic smoked salmon in value terms was in the range of X%-X%. Experts believe that this structure will remain at ... levels in the next few years. However, ...

...

**Table 3 Structure of the smoked salmon market in Romania by origin in 2012-2016, in tons**

Year	Market volume, in tons	Domestically produced products, in tons	Foreign products, in tons
2012	X	X	X
2013	X	X	X
2014	474	X	X
2015	X	X	X
2016	X	X	X

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)



**Fig. 2 Structure of the smoked salmon market in Romania by origin in 2012-2016 in volume terms, in %<sup>2</sup>**

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

<sup>2</sup> Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!



#### 6.4. Key recent trends on the smoked salmon market in Romania

Salmon is among the most consumed types of fish in Romania. ..., it takes the first place before all other types of fish and seafood. The overall fish and seafood market in Romania is expected to ... at ... rates in the medium term mostly driven by the .... The growth depends on a number of factors, among which the ..., ..., and ... Romanians still prefer to...

**Table 4 Structure of the Romanian smoked salmon market by product categories in brand value in 2016 in value terms, in % to the total**

Product category in brand value	Share in 2016 in value terms, in %
Low-priced brands	X%
Retailer private brands	X%
Known brands	X%
<b>Total</b>	<b>100.00%</b>

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

...

**Table 5 Main trade channels for smoked salmon retail distribution in Romania in 2016 in value terms, in % to the total**

Trade channel	Share of total sales in 2016 in value terms, in %
Supermarkets and hypermarkets	X%
Independent retailers	X%
Convenience stores	X%
Specialist retailers	X%
Others	X%
<b>Total</b>	<b>100.00%</b>

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

...

Strong branding exercises and fast paced expansion deepens this market control. There has been a general trend across the region of increased price consciousness among consumers, with many willing to visit various stores to seek out the cheapest option. On the one hand,...

...

## 6.5. Competitive landscape of the market

...

The smoked salmon market in Romania can be considered fragmented. As regards production, there are more than ... players. ... Although most of the companies are fairly small, there are also several companies of significant size involved in the secondary processing industry: Marine Harvest, .... The ... largest producers of smoked salmon in Romania are estimated to have a joint market share of more than X%. The production is ...

**Table 6 Market shares of the main players on the Romanian retail smoked salmon market in 2016, in % to the total (calculated in retail prices)**

Main players	Share in 2016, in %
Company A	X%
Company B	X%
Company C	X%
Company D	X%
Others	X%
<b>Total</b>	<b>100.00%</b>

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

...

As regards producing companies, the competitive landscape is not very easy to change as the market entry barriers are considerably high in Romania. These require choosing ...

...

## 6.6. Key drivers and restraints for the market development in the medium term

...

The growth in smoked salmon consumption will be driven by the ... combined with disposable income and population growth. The salmon is not the most affordable type of fish or meat, but has a number of other advantages. It is ..., its ... has been confirmed by a number of independent studies and it is free from religious barriers. This complies very well with the ...

...

## 7. Overview and analysis of the domestic production of smoked salmon in Romania

### 7.1. Volume, value and dynamics of the domestic production of smoked salmon in Romania in 2012-2016

As an overall, the Romanian production of smoked salmon in physical terms showed ... dynamics in the period 2012-2016. In 2012, in Romania were produced 188 tons of the product. In 2013, the indicator ... by ...%, which was followed by ... years of .... It happened at rates of ...% and ...%, respectively. In 2016, in Romania were produced X thousand tons, which was a total ... of ..., compared to 2012. Experts forecast that in the next few years, the Romanian production will ... at ... rates of ...% per year.

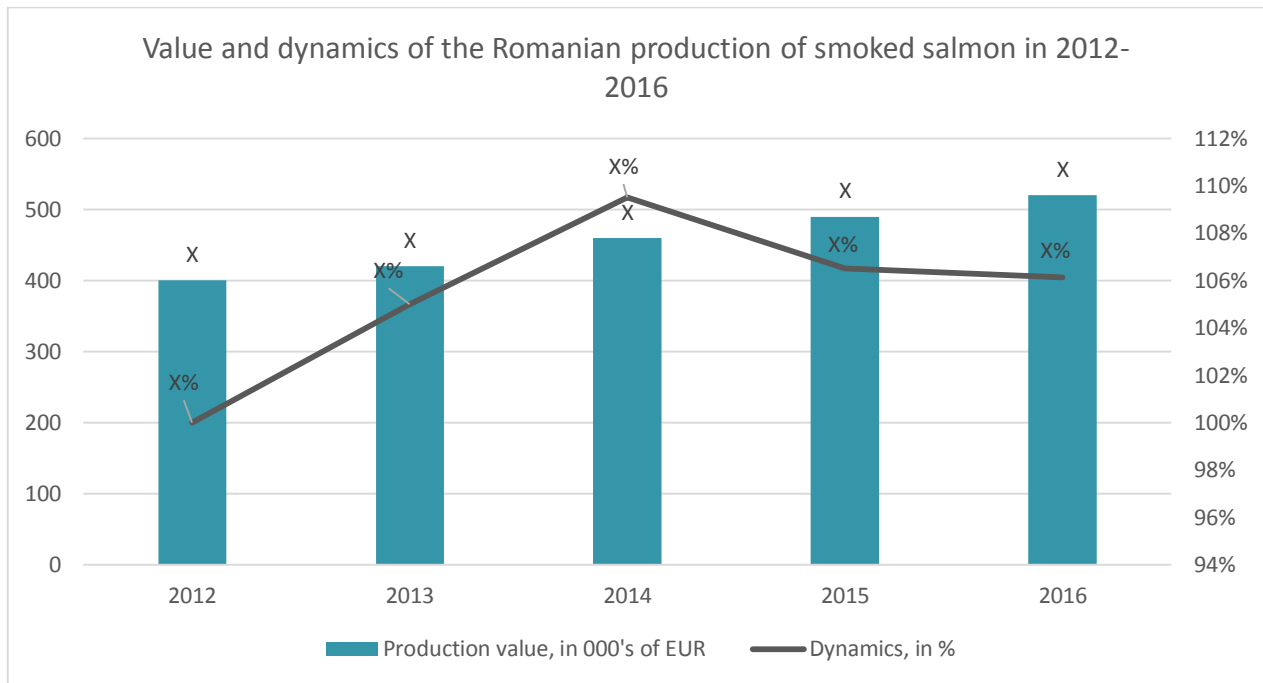
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**Table 7 Volume and dynamics of the domestic production of smoked salmon in Romania in 2012-2016, in tons and in %**

Year	Production volume, in tons	Dynamics, in %
2012	188	X%
2013	X	X%
2014	X	X%
2015	X	X%
2016	X	X%

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

...



**Fig. 3 Value and dynamics of the domestic production of smoked salmon in Romania in 2012-2016, in thousands of EUR and in %<sup>3</sup>**

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

...

<sup>3</sup> Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

### 7.3. Characteristics of the main companies, producers and distributors of smoked salmon in Romania

...

There are a number of large European companies, which are engaged in smoked salmon production in the region. Some of the leading of them are profiled in this sub-chapter. These specific companies have been included due to the fact that they have been referred to as leading by the interviewed market experts, industry media, secondary sources, etc. ... The companies are provided in no particular order or rankings. In addition, there are ...

...

#### **7.3.1. Company A**

...

## 8. Characteristics and analysis of the prices of smoked salmon in Romania

...

### 8.3. Characteristics of the producer prices of smoked salmon in Romania in 2012-2016

...

The average producer prices of smoked salmon in Romania in the period 2012-2016 showed ... dynamics. In 2012, one ton of smoked salmon, purchased directly from the producer cost about ... EUR in Romania. In the next two years, the indicator ... to reach its highest value for the period at ... EUR per ton in ... After this came ... rates of ...% and ...%, respectively. As a result, in 2016, the average producer price reached ... EUR per ton, which was an overall ... of ...% for the period. Experts expect that the average producer prices will ... in the next five years at ... rates of ...% per year.

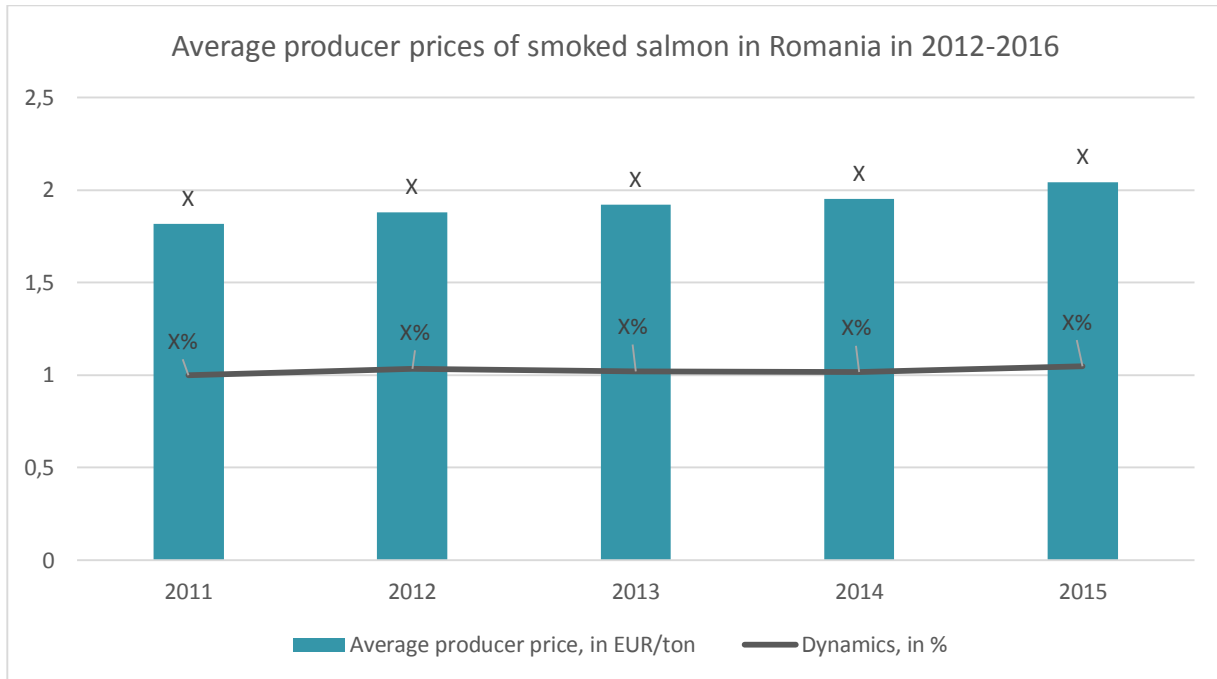
**Table 8 Volume and dynamics of the average producer prices of smoked salmon in Romania in 2012-2016, in EUR per ton and in %**

Year	Average producer price, in EUR/ton	Dynamics, in %
2011	X	X%
2012	X	X%
2013	X	X%
2014	11,586	X%
2015	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...





**Fig. 4 Volume and dynamics of the average producer prices of smoked salmon in Romania in 2012-2016, in EUR per ton<sup>4</sup>**

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

<sup>4</sup> Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

## 10. Overview and analysis of the imports of smoked salmon to the Romanian market

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### 10.2. Major trade inflows of smoked salmon imports to Romania

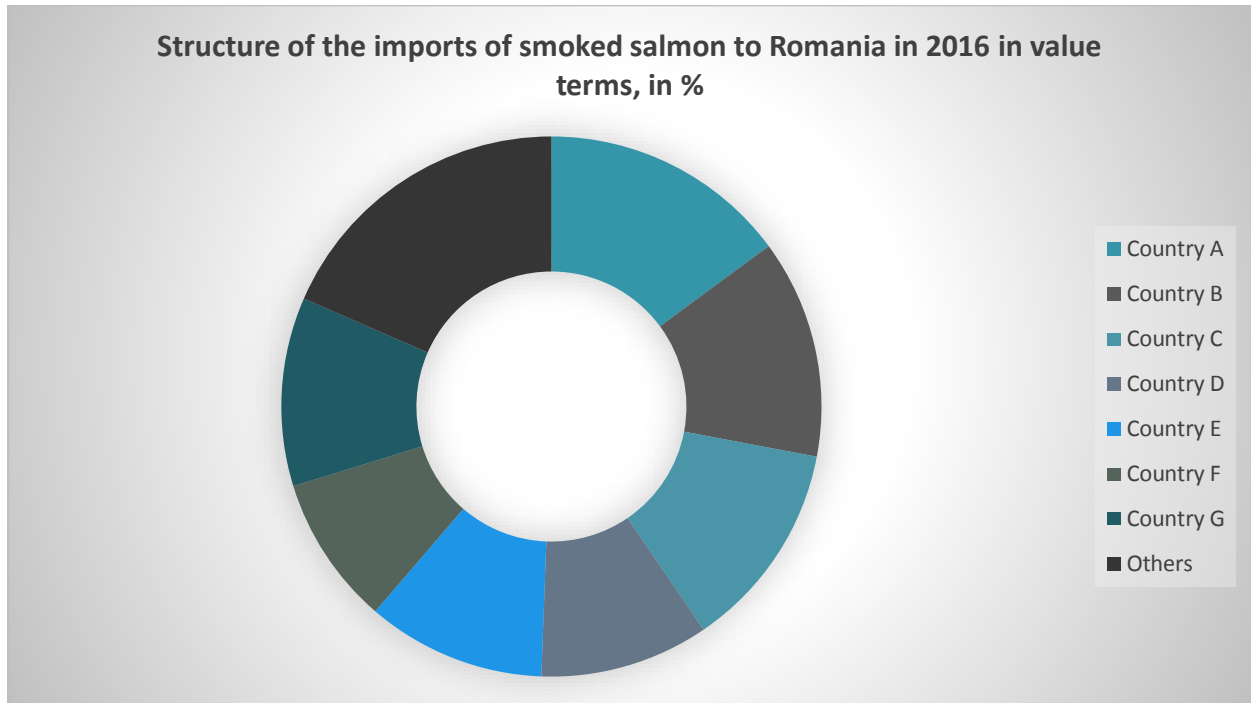
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In 2016, in volume terms, the main share of imports belonged to .... It was then followed by ... with ... thousand tons (...%) and ... with ... thousand tons (...%). The fourth and fifth place, respectively, were taken by ... and ... with ... (...%) and ... thousand tons (...%). In value terms, the three leading countries were - ..., ... and ... with imported products, equal to ... (...% of the total) , ... (...%) and ... EUR (...%).

**Table 9 Main countries, exporting smoked salmon to Romania in 2012-2016, in thousands of EUR and in %**

Exporting country	Import value in 2012, in 000's of EUR	Import value in 2013, in 000's of EUR	Import value in 2014, in 000's of EUR	Import value in 2015, in 000's of EUR	Import value in 2016, in 000's of EUR	CAGR 2012-2016	Share in 2016, in %
Country A	X	X	X	X	X	X%	X%
Country B	X	X	X	X	X	X%	X%
Country C	X	X	X	X	X	X%	X%
Country D	X	X	X	X	X	X%	X%
Country E	X	X	X	X	X	X%	X%
Country F	X	X	X	X	X	X%	X%
Country G	X	X	X	X	X	X%	X%
Country H	X	X	X	X	X	X%	X%
Country I	X	X	X	X	X	X%	X%
...	X	X	X	X	X	X%	X%
Other countries	X	X	X	X	X	X%	X%
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X%</b>	<b>X%</b>

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)



**Fig. 5 Main countries, exporting smoked salmon to Romania in 2016 in value terms, in %<sup>5</sup>**

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

...

<sup>5</sup> Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

## 12. Characteristics of the consumption of smoked salmon in Romania

### 12.1. Volume, value and dynamics of the consumption of smoked salmon in Romania in 2012-2016

...

The consumption volume of smoked salmon in Romania in 2012 was ... thousand tons, which were valued at ... billion EUR in producer prices. During the analyzed period, the consumption in both volume and value terms showed mixed dynamics...

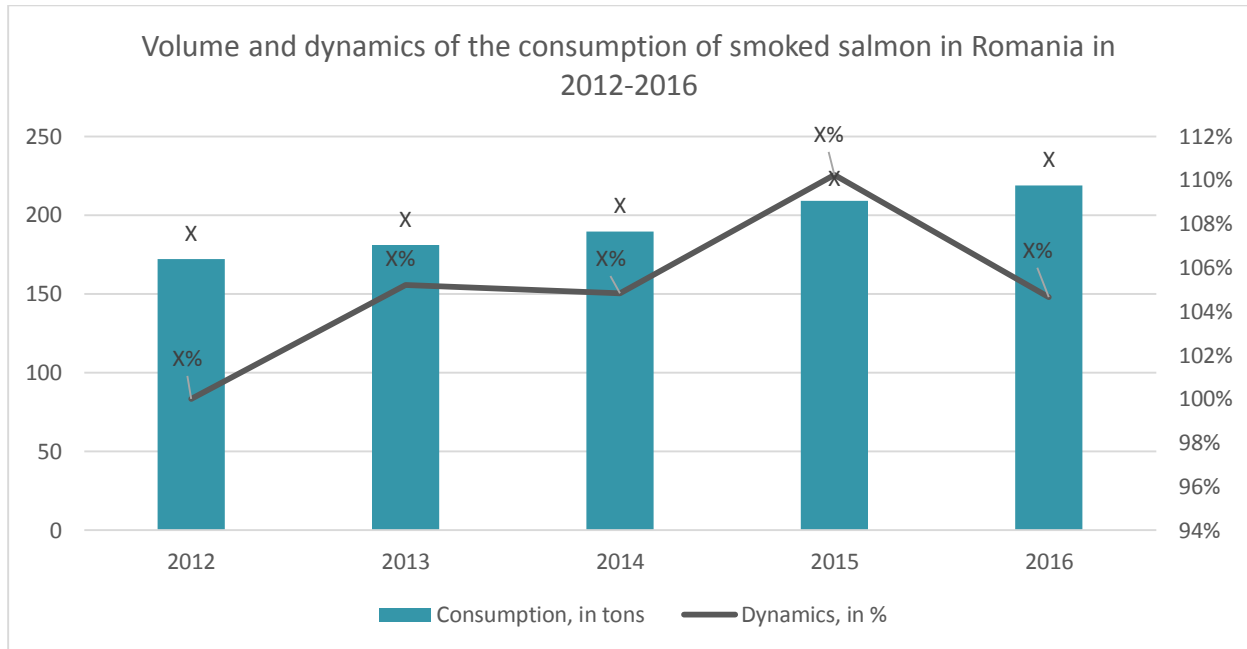
...

**Table 10 Volume, value and dynamics of the consumption of smoked salmon in Romania in 2012-2016, in tons, thousands of EUR and in %**

Year	Market volume, in tons	Market value, in 000's of EUR	Inventory levels	Consumption, in tons	Consumption, in 000's of EUR
2012	X	X	X%	X	X
2013	X	X	X%	X	X
2014	474	X	X%	X	X
2015	X	X	X%	X	X
2016	X	X	X%	X	X

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...



**Fig. 6 Volume and dynamics of the consumption of smoked salmon in Romania in 2012-2016, in tons and in %<sup>6</sup>**

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)

...

<sup>6</sup> Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

## 12.2. Volume, value and dynamics of the per capita consumption of smoked salmon in Romania in 2012-2016

...

... The Romanian average consumption in 2012 was ... kilograms per capita, which was equal to ... EUR per capita. In the next five years, the volume of per capita consumption in volume terms ... at CAGR of ...% per year to reach ... kilograms per capita, while the one in value terms ... at CAGR of ...% per annum and reached ... EUR per person...

...

**Table 11 Volume, value and dynamics of the per capita consumption of smoked salmon in Romania in 2012-2016, in kilograms per capita, EUR per capita and in %**

Year	Consumption per capita, in kg/capita	Dynamics, in %	Consumption per capita, in EUR/capita	Dynamics, in %
2012	X	X%	X	X%
2013	X	X%	X	X%
2014	X	X%	X	X%
2015	X	X%	X	X%
2016	X	X%	X	X%

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

...

### 12.3. Balance between supply and demand on the smoked salmon market in Romania in 2012-2016

...

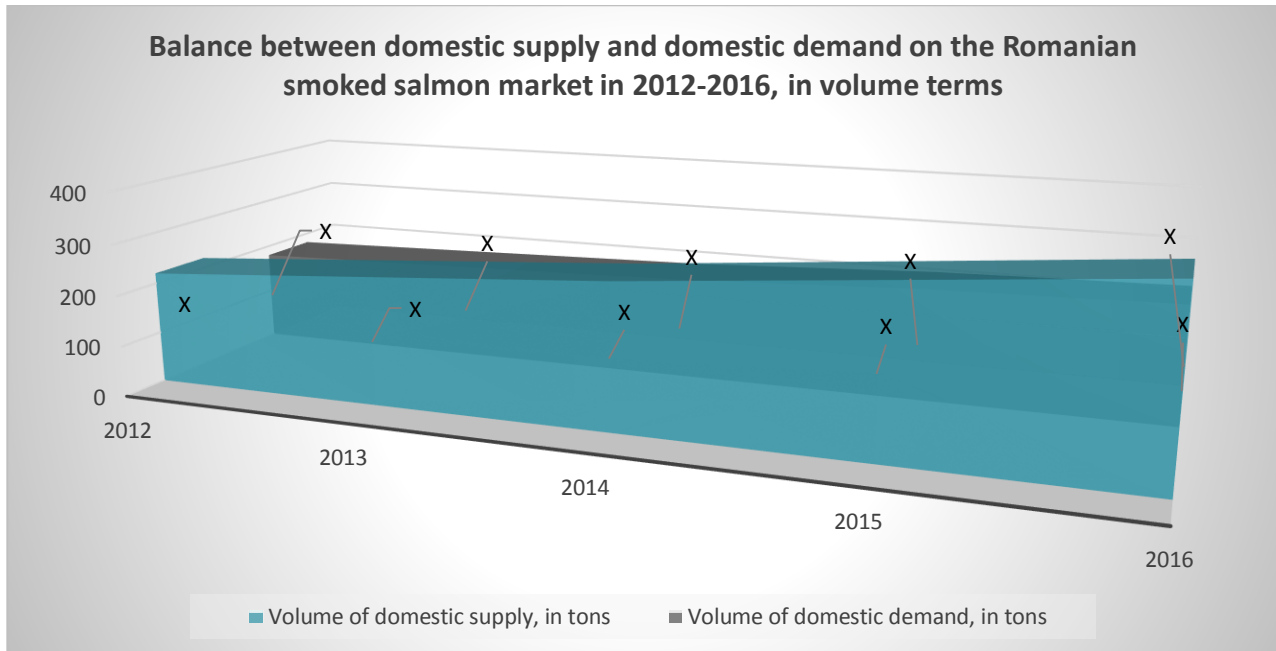
Due to the ... of domestic demand, the local balance between supply and demand in physical terms was ... with domestic supply being able to cover about X%-X% of the domestic demand in the last five years. In value terms, the situation was ... but had ... dynamics due to the ... In value terms, the balance between domestic supply and domestic demand was also ... with domestic supply being able to cover about X%-X% of the local demand in 2012-2016. It should be mentioned that a large part of the Romanian production is exported but mostly to ... countries. Experts forecast that the balance in both volume and value terms will remain ... in the next few years and the difference between the ....

...

**Table 12 Balance between domestic supply and domestic demand on the smoked salmon market in Romania in 2012-2016, in tons and in %**

Year	Volume of domestic supply, in tons	Volume of domestic demand, in tons	Balance, in tons	Supply, in % to the total demand
2012	X	X	X	X%
2013	X	X	X	X%
2014	X	X	X	X%
2015	X	X	X	X%
2016	X	X	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)



**Fig. 7 Balance between domestic supply and domestic demand on the smoked salmon market in Romania in 2012-2016, in tons<sup>7</sup>**

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

<sup>7</sup> Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!



## 12.4. Forecast for development of the smoked salmon market in Romania in 2017-2022

...

In the last five years, the smoked salmon market in Romania was dominated by ... and this trend will continue in the medium term. Due to the ..., the market will show ... in the period until 2022. Of course, this will happen if the overall Romanian economy is able to achieve ... of ...% per year and....

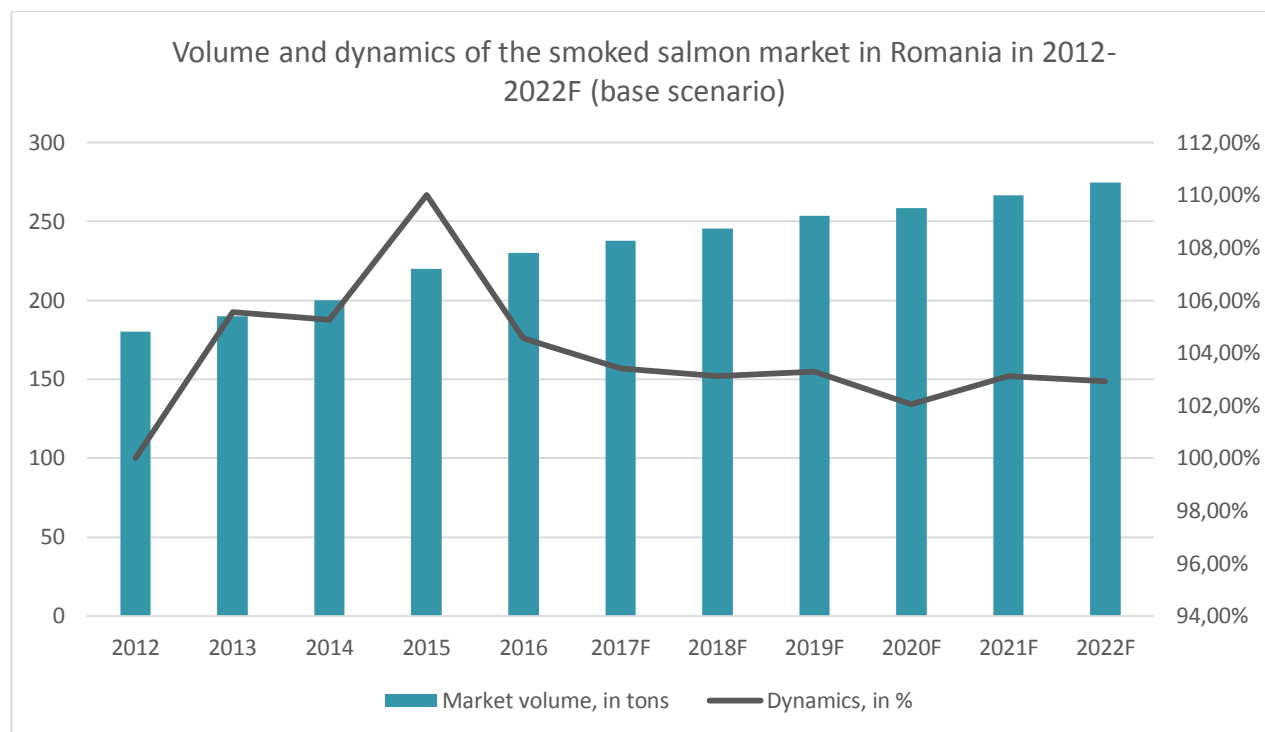
...

Under the base scenario for development, the Romanian economy will show ... rates of about ...% per year until 2022.... In this scenario, the annual market ... rate for the period will be about ...% per year, which means that the market volume in 2022 will reach ... thousand tons or ... billion EUR.

**Table 13 Volume, value and dynamics of the smoked salmon market in Romania in 2012-2016 and forecast for its development in 2017-2022 (under the framework of the base scenario), in tons, thousands of EUR and in %**

Year	Market volume, in tons	Dynamics, in %	Market value, in 000's of EUR	Dynamics, in %
2012	X	X%	X	X%
2013	X	X%	X	X%
2014	474	X%	X	X%
2015	X	X%	X	X%
2016	X	X%	X	X%
2017F	X	X%	X	X%
2018F	X	X%	X	X%
2019F	X	X%	X	X%
2020F	X	X%	X	X%
2021F	X	X%	X	X%
2022F	X	X%	X	X%

Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)



**Fig. 8 Volume and dynamics of the smoked salmon market in Romania in 2012-2016 and forecast for its development in 2017-2022 (under the framework of the base scenario), in tons and in %<sup>8</sup>**

*Source: Data (Official sources, Expert opinion, WMStrategy calculations), Analysis (WMStrategy)*

<sup>8</sup> Please, bear in mind that the figures, presented in this demo version are for illustrative purposes only and might differ from the real figures you will get by purchasing the full report!

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