

Overview of Moldova's Agriculture and Food Processing Industry

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Introduction

Opportunities for U.S. companies abound in the Moldovan food sector. The sector needs investment, modern equipment and new management practices. Moldova could also serve as a launching pad for business into the vast CIS market due to a free trade arrangement and the emerging free trade zone of South Eastern Europe, encompassing all of the Balkans and Moldova.

Moderate continental climate, natural resources and landscape contributed to Moldova's focus on agriculture and food production. The unique combination of climate and fertile soil give the fruits and vegetables grown in Moldova a specific taste and flavor that many experts consider superior to those raised by other traditional East European producers such as Hungary and Poland. Moldova's close location to a wide array of agricultural suppliers allowed it to specialize in the production of fresh and processed fruits and vegetables, juices, wine and tobacco during the Soviet period. Only a tenth of the country's output can be consumed domestically. Tiny Moldova was the fourth largest producer of vegetables in the former USSR, accounting for 15 percent of the total output of canned fruits and vegetables. Moldova remains a net exporter of food products.

Hailed in the past as the best performer in the CIS in terms of reform, Moldova's path toward a market economy has recently been marked by conflicting decisions. The government has nevertheless affirmed its commitment to reform and is continuing to privatize state-run companies. In 2001, Moldova gained membership in the World Trade Organization, and the World Bank and the International Monetary Fund are ready to resume financing to Moldova after suspending it for more than a year. Laws are in place, including a new Civil Code welcomed by the World Bank, that provide the framework for economic activity under market conditions.

This overview gives short descriptions of sectors of Moldovan agriculture and food industries that could provide business opportunities.

Agriculture

Agriculture and food production represents the foundation of the Moldovan economy, comprising a third of the country's GDP and providing employment for almost half of the working population. With agricultural land covering 75 percent of the nation, in good years the agribusiness sector accounts for 75 percent of the country's total exports. This specialization in agricultural production is due to favorable climatic conditions and higher than average soil fertility. Over 72 percent of the territory is comprised of the fertile jet-black soil called chernozem, which represents the highest percentage anywhere in the world.

Arable land represents 71 percent of the agricultural land; perennial plantations comprising orchards and vineyards account for 14 percent. Pastures take up the remaining 15 percent of agricultural land.

As a result of land reform efforts started in 1992, over 80 percent of agricultural land, and the overwhelming majority of state and collective farms, were privatized. Individual farmers now supply about 75 percent of the country's agricultural produce.

After a declining trend in agricultural output beginning in 1990, in 2001 agricultural output was four percent higher than in 2000, at USD 710 million. Agricultural growth in 2001 was a result of a 7.6-percent increase in vegetable production. Animal production, however, decreased by 3.4 percent.

Notwithstanding the overall growth, agricultural output was still only half the level of 1990. Livestock production has been most affected by the adjustment to a market economy, being in continuous decline since 1990. Crop yields have also decreased.

Crops represented 70 percent of agricultural output in 2001, with livestock production claiming the remaining 30 percent.

Agriculture provides the raw materials for such Moldovan food processing industries as wine and beverages, sugar, oil and fats, bakeries, confectioneries, yeast, food concentrates, dairy products, meats, canned fruits and vegetables, essential oils, and perfumery and cosmetics. Its share of over 50 percent in total industrial output reveals the importance of the food industry to the Moldovan economy.

During central planning Moldova's role was to supply agricultural and food products to other republics of the former Soviet Union, mainly Russia. Raw fruits and vegetables accounted for less than 30 percent of all agri-food exports, with other exported agricultural goods undergoing some type of processing by Moldovan food companies. The total production capacity of the food industry far exceeds domestic demand; therefore the vast majority of food products were and are still exported. Following the breakup of the Soviet Union, the production capacity of most food companies has been underutilized. Among the reasons for this decline are the drop in agricultural output, contraction of the purchasing power in traditional markets, underdeveloped marketing and insufficient funding for capital investment. Brief descriptions of the agribusiness sectors follow.

Canned fruits and vegetables

The industry is primarily export-oriented, with about 90 percent of processed fruits and vegetables being shipped out of the country. Moldovan canneries process all types of fruits and vegetables grown in Moldova, particularly apples, tomatoes, peaches, plums and peas. The industry produces a variety of products, including juices, juice concentrate, jam, pickles and marinades, salads, tomato paste, ketchup, frozen fruits and vegetables and dried fruits. According to the Ministry of Agriculture and Food, in 2001 canned fruits accounted for 47 percent of total output in this sector, followed by juice concentrate at 22 percent, canned tomatoes at 10 percent and other vegetables at 21 percent.

While the total surface area planted with vegetables has changed insignificantly over the last years, lower yields led to a decrease in the output of vegetables. Tomatoes, onions, cabbage and cucumbers are the main vegetables cultivated in Moldova. Tomatoes and peas underwent the sharpest decrease in output relative to the early nineties.

Table. Output of vegetables

	1990	1995	1999	2000	2001
Tomatoes, 000 tons	737.0	120.4	166.0	104.0	105.0

Surface area, 000 ha	28.5	12.5	11.8	12.4	12.1
Cabbage, 000 tons	77.0	54.1	50.2	43.0	43.8
Surface area, 000 ha	4.8	5.7	5.5	5.9	6.9
Cucumbers, 000 tons	20.0	12.5	32.0	19.9	17.9
Surface area, 000 ha	3.3	3.3	3.4	3.5	4.5
Onions, 000 tons	31.0	12.5	73.5	53.7	68.0
Surface area, 000 ha	3.1	3.1	10.6	11.3	10.0
Green peas, 000 tons	36.5	5.0	3.0	1.7	4.8
Surface area, 000 ha	7.5	2.3	2.0	1.2	1.5
Other vegetables, 000 tons	259.4	250.6	138.8	127.6	203.2
Surface area, 000 ha	12.6	31.5	14.5	15.9	27.2
Total output, 000 tons	1161.0	455.2	463.5	350.0	442.7
Surface area, 000 ha	59.8	58.4	47.8	50.2	62.2

Source: Ministry of Agriculture and Food

Companies in the north traditionally specialize in apple juice concentrate, while companies in the center and south primarily process vegetables and produce juices from apricots and peaches.

The difficult situation in agriculture has affected the activity of canning companies. Since 1997 output in the industry has been halved. Due to lower yields and productivity, farms fail to supply canneries with the needed fruits and vegetables. By some reports, some canneries had to import raw materials from abroad to produce juice. At the same time, canneries sometimes do not make good on their payment commitments toward farms. The progressive aging of orchards and vineyards is another problem. The total area of uprooted orchards is much larger than the area of new plantations. According to some specialists in the Ministry of Agriculture, the area of orchards will continue to decrease to an optimum level of about 80,000 hectares. The use of intensive agricultural methods on such areas may increase yields and produce an output comparable to the early nineties levels. A few Moldovan food-processing companies have sought integration with suppliers and implement intensive agricultural methods in orchards they own or lease from local farmers.

Table. Output of orchards

	1990	1995	1999	2000	2001
Total output, 000 tons	901.0	528.0	136.3	290.3	317.5
Surface area, 000 ha	234.0	212	145.5	141.9	121.2

Source: Ministry of Agriculture and Food

Apples are the most common fruit harvested in Moldova, representing about 60 percent of all orchards. Other fruits grown in substantial amounts are plums, peaches, cherries, apricots and pears.

Walnut trees also grow in Moldova, albeit on a smaller scale. Even though organized walnut production is not so developed, Moldova is among the largest producers of walnuts in Europe. FoodPro International of the U.S. is among the few companies in Moldova to mechanize walnut cracking and packaging and invest in the development of walnut orchards.

After shrinkage in the industry since 1998, mainly as a result of the Russian ruble crisis, the first signs of recovery in food processing appeared in 2000.

Table. Output of canned fruits and vegetables

	1997	1998	1999	2000	2001
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Total output, 000 tons	109.2	84.5	49.8	49.4	56.4
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Source: Ministry of Agriculture and Food

Moldova has 14 large manufacturers of canned fruits and vegetables and 40 smaller canneries, according to the Ministry of Agriculture and Food. Most of the small canneries served in the past as primary processing facilities for larger companies. After the privatization of farms, some of these facilities have set up their own canning lines.

The annual production capacity of the canneries is 300,000 tons of canned fruits and vegetables. The industry can also produce 60,000 tons of apple juice, 6,000 tons of dried fruits and 4,000 tons of frozen fruits, according to the Moldovan Business Information Network.

As part of the former Soviet Union, Moldova was the main supplier of fresh and processed fruits. The disruption of relations with traditional markets and failure to adjust to the new economic realities after the collapse of the Soviet Union led to a decrease in the utilization of production capacity in the canning industry. The average rate of capacity utilization is less than 30 percent in the recent years. Some canneries were declared bankrupt. Large canneries tried nevertheless to respond to changes in demand on the foreign markets, most especially Russia, and switched from packaging in conventional cap sealed jars or tin cans to aseptic cartons. Some companies also provide packaging in glass jars and bottles with twist-off caps. Nevertheless, most of the equipment is outdated and the Ministry of Agriculture and Food estimates that USD 30 million is needed to renovate production facilities.

According to the Ministry of Agriculture and Food, the leading canning enterprises are Orhei-Vit with a capacity of 32,000 tons of canned fruits and vegetables, Alfa-Nistru (26,000 tons), Natur-Vit (23,000 tons), Rozmiar (22,000 tons), Fabrica de Conserve Cosnita (14,000 tons) and Fabrica de Conserve Floresti (4,000 tons).

Orhei-Vit is among the few ISO9001 certified companies in Moldova. It produces a variety of juices, jam, vegetable salads and baby foods. The company was among the first to implement packaging in cartons and later in jars with twist-off caps. Among its plans is the installation of a deep freezer with a capacity of 3,500 tons of fruits and vegetables each season.

Alfa-Nistru aspires to be an example of integration in the supply chain. The company has invested in the development of 250 hectares of apple orchards and 100 hectares of berry orchards, according to the Ministry of Agriculture and Food. It plans to set up its own deep freezers. According to the local media, Alfa-Nistru commands 20 percent of the local Moldovan market of canned fruits and vegetables. It exports most of its output.

A few smaller canneries have also been successful and have become competitive on the local and foreign markets for juices and salads.

Dairy Industry

Milk processing has been traditional in Moldova and is a strategic industry due to its importance to the population's nutrition. The difficult situation in livestock farming caused a crisis in the dairy industry. Cattle herds have decreased since the collapse of the Soviet Union. Average output per dairy cow was also down due to higher feed prices and the resulting shortfall in highly nutritional feed materials. Lately, individual farmers have increased their cattle stock more than have the large former collective farms.

According to the Ministry of Agriculture and Food, Moldova has 22 dairy companies, only 12 of which are currently operating, produce a wide variety of dairy products, including whole and skimmed milk, milk powder, yogurts, kefir, cream, ice cream, butter and various kinds of cheese. In the past, these companies also heavily exported to neighboring republics of the former Soviet Union. Today, the output of dairy products has decreased dramatically. As a result, and with only 12 dairy companies currently functioning, capacity utilization is less than 20 percent in the industry. The Ministry of Agriculture and Food estimates that if all dairy companies were operating at capacity, they could process 945,000 tons of milk per year. Dairies currently process only 20 percent of the milk produced by Moldovan farms. Farmers either consume the rest of the milk or sell it directly in the public markets of the cities as whole milk or homemade cheese.

Table. Volume of milk acquired by Moldovan dairy farms for further processing

	1990	1995	1999	2000	2001
Processed milk, 000 tons	1,230	190	78.6	98.9	133.8

Source: Ministry of Agriculture and Food/Department of Statistics

Moldova is a net exporter of dairy products, primarily milk powder, butter, whole milk and cream. The main destinations of Moldovan dairy exports are Romania, the Baltic States and Russia. Even though locally produced products prevail, Moldova imports significant amounts of yogurts, baby food and cheese from Russia, Germany, Ukraine and Romania.

According to the local media, Incomlac, a company based in the northern city of Balti, commands a 45 percent share of the Moldovan whole milk market. The company was the first to set up milk collection sites for individual dairy farmers. Incomlac also produces about 50 percent of the milk powder in Moldova. Other big producers of milk powder are Lapte, located in Chisinau, and Inlac, located in the northern town of Cupcini. Both of these companies sell significant quantities of dairy products on the Moldovan market.

The first U.S. investor in the Moldovan dairy industry is Food Master International. The U.S. investor set up the Alba company, which in turn controls two dairy companies. It was among the first dairy companies in Moldova to associate its products with its own brand and introduce attractive new packaging for its products. According to the local media, Alba controls one-third of the country's whole milk market and 80 percent of the local cheese market.

Table. Output of dairy products

	1997	1998	1999	2000	2001
Whole products, 000 tons	26.2	32.0	25.8	26.6	35.3
Butter, 000 tons	2.3	2.6	2.0	2.5	3.2
Cheese, 000 tons	0.9	1.1	1.0	1.0	1.4
Milk powder, 000 tons	3.0	2.6	2.0	3.3	5.0
Ice cream, 000 tons	2.0	2.4	4.9	4.2	4.6

Source: Ministry of Agriculture and Food

Meat processing industry

Like the dairy industry, the evolution of the meat industry is tied to the livestock sector. The disappearance of large cattle, pig, and chicken farms has led to a decrease in livestock and a consequent drop in the output of fresh meat and meat products. The private sector has increased its role in the industry compared to that of collective farms.

The north and the center of the country have been traditional areas for raising cattle and pigs, while the south has been used more for sheep and goats.

Known in the past to be big exporters, Moldovan meat processors have started importing meat from abroad due to the decline in indigenous livestock. According to the Ministry of Agriculture and Food, poultry is the dominant import. Less than a half of the existing 30 Moldovan poultry farms are active.

The two largest producers in the market are Carmez in the capital city of Chisinau, and Basarabia Nord in the northern city of Balti. Both companies have developed good domestic distribution networks. According to the Ministry of Agriculture and Food, the two companies process over 70 percent of the meat in the country. More than 60 small and medium-sized companies process the remaining amounts. The situation of most meat processing facilities has worsened due to a lack of investment in new equipment and inability to ensure proper quality standards. Capacity utilization is estimated at 30 percent. Some meat processors have restricted their activity to providing slaughterhouse services. Nevertheless, some companies manage to invest in new equipment and ensure high quality standards. Basarabia Nord is, for example, the first company in the industry to be ISO9001 certified. Carmez set up a joint venture with a Belgian company, and exports sausage and salami to Russia. Other small companies such as R&R, Soror-Meteor and Mascautan are also popular among local consumers due to their quality.

Table. Output of meat products

	1997	1998	1999	2000	2001
Meat in carcasses, 000 tons	31.7	20.2	18.9	8.6	3.9
Salami and sausage, 000 tons	6.1	6.8	8.0	8.1	8.5
Canned meat, 000 tons	2.6	2.2	1.7	2.5	2.0
Semi finished products, 000 tons	1.3	1.0	1.4	1.5	1.4
Fats, 000 tons	1.0	0.5	0.4	0.9	0.06

Source: Ministry of Agriculture and Food

Oil Industry

The oil industry provides about two percent of total food industry output. Sunflower is the traditional oleaginous plant cultivated in Moldova and therefore is the primary source for the production of vegetable oil. Other plants used for food oil production, albeit in lower volumes, are soy, rape and mustard.

Table. Output of sunflower seeds and soybeans

Output	1989	1990	1995	1999	2000	2001
Sunflower seeds, 000 tons	278.8	244.9	208.8	258.6	268.4	277.7
Surface area, 000 ha	128.0	133.0	143.0	215.0	227.6	208.2
Soybeans, 000 tons	37.2	25.3	6.7	16.9	11.6	9.3
Surface area, 000 ha	51.4	23.8	2.9	13.7	11.7	9.9

Source: Ministry of Agriculture and Food

Local producers can meet the demand for food oil. Moldova has three large oil producers and some 70 smaller oil mills, according to the Ministry of Agriculture and Food. According to some estimates in the local media, the industry could process over 320,000 tons of sunflower seeds into 120,000 tons of oil annually if capacity utilization is full. Capacity utilization is, however, as low as 10 percent. Moldova's domestic market size is estimated at 25,000-30,000 tons of vegetable oil.

One of the largest local vegetable oil companies is the Bender food oil factory. This company is located in the breakaway region of Transnistria and therefore there is little data available about its activity.

Of the remaining two large oil mills, only Floarea Soarelui, located in the northern city of Balti, is operating. The company has virtually no competition among local producers for its high-quality refined odorless food oil. All other small oil mills lack the capacity to produce high-quality oil. W.J. Grain, Ltd. of the U.S. bought 72 percent of Floarea Soarelui shares in 2000. The company has the capacity to process over 260,000 tons of sunflower seeds annually, but lack of raw material supply has kept production down to 35 percent of capacity. In 2001, Floarea Soarelui exported over 80 percent of its output to such countries as Hungary, Romania, Bulgaria, the United Kingdom, Russia and Uzbekistan.

According to the Ministry of Agriculture and Food, Floarea Soarelui processes only 30 percent of all sunflower seeds grown in Moldova. The rest is either exported or processed into oil by smaller oil mills. Due to higher prices offered by export markets, farms prefer to sell sunflower seeds abroad. In the previous four years, over 60,000 tons of sunflower seeds were exported yearly to such countries as Ukraine, the U.S. and Hungary. To cover this gap, Floarea Soarelui imports soybeans for the production of oil.

To tackle the problem of low yields and develop the output of sunflower seeds, the Government of Moldova has recently approved a strategy for development of the production of sunflower seeds and vegetal oil for 2002-2010.

Table. Output of vegetable oil

Output	1990	1995	1999	2000	2001
Vegetable oil, 000 tons	77.9	20.2	11.0	15.4	31.4

Source: Ministry of Agriculture and Food

Essential oils

The industry has great potential. Essential oils are primarily used in perfumes and cosmetics, confectionaries, and medicine. Moldova manufactured up to 50 percent of the volume of essential oils from certain types of plants and herbs in the former Soviet Union. In the early '90s 12 Moldovan companies produced up to 165 tons of essential oils a year. Now the annual volume of production is only 20 tons. Domestic prices for essential oils are usually lower than abroad.

Dill, lavender, salvage and rose are the typical plants cultivated for the production of essential oils. These crops occupy slightly more than 1,000 hectares of agricultural land. According to the Ministry of Agriculture and Food, the Moldova-Luxemburg joint venture Volatile West Company is the only operational company in this sector. The company needs to make a significant investment in new equipment.

Sugar

Moldova has always been a large producer and exporter of beet sugar. Moldova provided five percent of all beet sugar manufactured in the former Soviet Union and was the third largest producer after Ukraine and Russia. With a total annual processing capacity of 3.5 million tons of sugar beet, which yielded 400,000 tons of sugar, sugar refineries were exporting to Russia, since local demand was lower than supply. By some estimates, Moldova's annual demand for sugar is

80,000-120,000 tons. Moldovan sugar refineries had a competitive advantage over the former Soviet sugar refineries due to lower production costs.

Moldova has nine refineries that process sugar beets into sugar. All of them are located in the northern part of Moldova close to the suppliers of sugar beets. The refineries have been fully privatized. Like the rest of the economy, the sugar industry has experienced a decline since the breakup of the Soviet Union. Despite one significant foreign investment detailed below, many production facilities are typically used at half of their capacity, and two of the nine factories have been idle for two years. Due to a decrease in acreage under sugar beet cultivation, the total output of sugar has declined more than 60 percent between 1990 and 2001. At the same time, sugar beet yields have also fallen from 39 tons to 15 tons per hectare due to lower use of fertilizers and chemicals. By comparison, in Germany one hectare yields 65-70 tons of sugar beets subsequently refined into 10 tons of sugar. In Moldova, the output of sugar from one hectare is just 2 tons, which points to the underutilized potential of the industry.

Table. Output of sugar and sugar beet

	1990	1995	1999	2000	2001
Sugar beet, thousand tons	2379.0	1887.3	926.7	943.4	1193.6
Surface area, thousand ha	81.5	81.0	60.2	62.6	59.5
Sugar, thousand tons	435.8	197.2	98.9	102.4	129.9

Source: *Moldovan Ministry of Agriculture and Food*

The first foreign investor to appreciate the potential of the Moldova sugar industry was the German company Suedzucker AG Mannheim/Ochsenfurt, the largest producer of beet sugar in the world. In association with a local commercial bank, Suedzucker controls four sugar refineries and holds a significant stake in another. The German company has invested in new equipment for the refineries and the development of its supplier base. Suedzucker virtually controls 75 percent of all sugar production in Moldova. The company plans to increase production and to export 77 percent of its output by 2004. The entry of Suedzucker into the Moldovan sugar market in 1998 also meant the introduction of new marketing tools in the industry. The company has developed its own "Five Hearts" brand name for sugar produced in Moldova.

According to the local media, three U.S. investment funds, Grand Group, Bradbury Technology and Acadia Enterprises, have bought a controlling stake in the currently idle Harbova sugar factory. Aside from sugar, the factory can also produce citric acid. As a matter of fact, the factory is the sole firm in Moldova capable of producing citric acid and among the few in the CIS. However, the company has been idle for more than two years. The U.S. investors reportedly plan to invest USD 10 million by November 1, 2003 and to import raw cane sugar for further refining into finished sugar.

Baking industry

The industry is made up of six large and more than 130 small bakeries. Total sales in the industry have been falling in recent years and production capacity utilization is currently only 30 percent. According to some reports, sales dropped as a result of lower standards of living, large labor emigration (over 500,000 Moldovans work abroad) and the prevalence of payment in kind in rural areas. Also, the population in rural areas prefers to bake its own homemade bread. Another reason is the emergence of small local bakeries, the sales of which are not accounted for in official statistics.

Table. Output of crops

Output	1989	1990	1995	1999	2000	2001
Wheat, 000 tons	1178.2	1176.3	1111.5	797.8	725.0	1180.0
Surface area, 000 ha	282.0	286.7	340.3	339.5	369.9	433.8
Corn, 000 tons	1585.7	885.5	908.2	1140.0	1031.0	1116.5
Surface area, 000 ha	314.3	258.0	307.0	396.0	414.4	471.1
Barley, 000 tons	466.8	437.9	305.1	182.6	133	232.8
Surface area, 000 ha	129.1	120.4	111.5	107.4	105.6	99
Oats, 000 tons	8.1	4.1	8.0	4.9	2.4	5.2
Surface area, 000 ha	3.2	2.1	4.9	3.8	3.0	3.6

Source: Ministry of Agriculture and Food

The largest bakery in the country is Franzeluta, which provides about 60 percent of all bread products in Moldova, according to the Ministry of Agriculture and Food. The bakery produces over 600 of items of bread, pasta, crackers and cakes, which are sold on the domestic and foreign markets. Franzeluta is the main supplier of bread to the capital city of Chisinau. It is the only bakery in which the government holds a majority share (56 percent).

Small bakeries are mostly known for baking specific products, such as French baguettes, crackers, or Turkish and Caucasian bread.

Table. Output of bakery products

	1997	1998	1999	2000	2001
Bread and bread products, 000 tons	116.0	94.3	67.6	62.9	67.1
Pasta, 000 tons	9.0	8.9	5.7	9.7	9.1
Crackers, biscuits and cakes, 000 tons	3.6	3.5	3.8	3.3	3.4

Source: Ministry of Agriculture and Food

Moldova inherited large crop milling and storage capacities from the Soviet period that far exceed the needs of the local market. In the past, this excess capacity was used to process and store imported grains. This imported grain allowed the companies to produce some 2 million tons of fodder and 1.5 million tons of flour. Moldova exported about two-thirds of the output. Today, most of this capacity is unused. According to the local media, farmers store only 10 percent of their cereal crops in Moldova's elevators, as most of them prefer to store grains in their own storage facilities.

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