

MARKETING HELLIM / HALLOUMI CHEESE: A COMPARATIVE STUDY OF NORTHERN AND SOUTHERN CYPRUS

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Abstract. Traditional Cyprus cheese, known as hellim in the Northern part of Cyprus (the Turkish Republic of Northern Cyprus) and halloumi in the Southern part of Cyprus (the Republic of Cyprus) is a unique cheese product known for centuries. Nowadays, as the industrial production of hellim / halloumi cheese is developing, and the product starts to gain its popularity on external markets, ongoing issues of obtaining geographical indications are taking place. The aim of the study is to compare approaches used both by the Northern and Southern Cyprus producers to market their traditional cheese on export markets. The results show that both parts of the island have agreed on the recipe of the hellim / halloumi cheese. Currently, the Southern Cyprus has double the capacity to produce, and the price on the export markets is 40% higher. The main export markets and marketing strategies used by the two parts of the divided island are very different, thus, the author concludes that the Southern and the Northern Cyprus are not direct competitors when it comes to exporting and marketing their traditional cheese and can obtain geographical indications together, as it would benefit both.

Key words: marketing, export, Cyprus, country of origin.

JEL code: M31, E23, F14

Introduction

The island of Cyprus has a long history of being divided into two parts - South and North Cyprus but one thing Cypriots from both sides share is their love for their traditional delicacy-halloumi cheese, as it is known in Southern Cyprus and hellim cheese in Northern Cyprus. Hellim / halloumi cheese is a white rindless semi-hard cheese having a compact elastic texture with no holes which has been manufactured on the island of Cyprus from time immemorial (Raphaelides et al., 2006; Kaminarides, Stamou, Massouras, 2007), and its main feature is a high melting point, which allows to process it in multiple ways - eat raw, fry, grill and oven cook. Hellim / halloumi cheese is not only consumed by locals in excessive amounts but also exported to numerous countries. Recent attempts to obtain geographical indications for the hellim / halloumi cheese in the USA, the EU and Turkey by both governments of the divided island have led to political and social pressure on the island. The hypothesis of the study is set as follows: *there is no direct relationship between export markets and marketing strategies used by Southern Cyprus and Northern Cyprus hellim / halloumi producers*. By proving this hypothesis the author aims to conclude that focus and approach used

by each country are different and Southern Cyprus and Northern Cyprus are not direct market competitors and should not consider each other as one. There is an export market for each, and obtaining geographical indications together by two sides of the divided island is the most beneficial strategy for both. The following tasks are set to reach the aim of the study:

- 1) to describe the history of hellim / halloumi cheese and its varieties;
- 2) to summarize the main outcomes of the efforts to obtain geographical indications for hellim / halloumi cheese;
- 3) to compare and contrast ways of production and marketing of the hellim / halloumi cheese from Southern and Northern Cyprus.

The method used to show differences between Southern and Northern Cyprus hellim / halloumi export markets and strategies is a comparative study. Comparative study is used in social sciences (Hantrais, 1999) to identify and illuminate similarities and differences, not only in the observed characteristics of particular institutions, systems or practices but also in the search for possible explanations in terms of national likeness and unlikeness. Following the methodology suggested by Lor (2011), first, the

author has chosen the level of analysis, which are two parts of divided country- Southern and Northern Cyprus. Then, units of analysis are set, which helps to study the phenomenon in more detail. In the current paper, the aim is to study the differences between producing and exporting hellim / halloumi cheese by two parts of the country, thus, the author has chosen units of analysis to reflect the aim of the study as follows: producers, the amounts produced, local consumption, export, main exporters, main export markets, export strategies. In order to achieve the set aim of the study, the author has used academic articles and other scientific information as well as available information from Trade Service of the Ministry of Energy, Commerce, Industry and Tourism and the Republic of Cyprus Statistical Service in Southern Cyprus. Northern Cyprus has less information provided on hellim / halloumi issues as well as limited statistics but the author has approached the Cyprus Turkish Chamber of Industry, which is currently working on hellim / halloumi issues and geographical indications, to obtain the necessary information.

Research results and discussion

1. Traditional hellim / halloumi cheese

Hellim / halloumi nowadays is known as a traditional Cypriot cheese, and what is unique is that it has multiple variations on how it can be produced, packed, marketed and served. It can be made from sheep or goat milk or a mixture of both. It can also be made from cow milk (Ozturk et. al., 2014). When it comes to the historical roots and origins of hellim / halloumi cheese, there is no consensus on the issue. While some insist it is exclusively Greek or Turkish Cypriot delicacy, etymologically, the term halloumi points to an Arabic root and cultural historians insist on Venetian sources that had encountered halloumi in the pre-Ottoman period (Patapiou, 2006). Osam and Kasapoglu (2010) have undertaken a study and concluded that within the framework of

Jelgava, LLU ESAF, 21-22 April 2016, pp. 134-135 historical and archeological studies, the origin of Hallumi goes to Egyptian and Roman civilizations. Whatever is the case, multiple authors have concluded that hellim / halloumi cheese was known well before ethnic communities of Greek and Turkish Cypriots have formed.

Both communities - Greek and Turkish Cypriots have agreed on the quality and attributes of hellim / halloumi cheese. According to 'Χαλλουμί' (Halloumi)/'Hellim' food scheme (Publication of an Application..., 2015), there are two types of hellim / halloumi- fresh and mature. It is prepared from sheep, goat or cow's milk and proportion of sheep or goat's milk or the mixture must always be greater than the proportion of cow's milk.

2. Dispute over geographical indications for the hellim / halloumi cheese

Consumers' attitudes toward quality and desire for cultural identification have generated a growing demand for agricultural products that carry a strong identification with a particular geographical region (Loureiro, McCluskey, 2000). Foods that carry geographical indications issued in the EU are French Champagne and Morbier cheese and Italian Neapolitan pizza and Bra cheese to name some, allowing the production to take place exclusively in these geographic regions by following strict regulations and quality control (EU Agricultural Product..., 2016). If used properly, these identifications can become a powerful marketing tool and lead to greater economic value (Addor, Grazioli, 2005). In the European Union, three types of geographical indications (GI) are used, namely Protected Designation of Origin (PDO) that covers agricultural products and foodstuffs which are produced, processed and prepared in a given geographical area using recognized know-how; Protected Geographical Indication (PGI) that covers agricultural products and foodstuffs closely linked to the geographical area, and at least one of the stages of production, processing

or preparation takes place in the area; and Traditional Speciality Guaranteed (TSG) that aims to highlight traditional character, either in the composition or means of production (Geographical Indications and..., 2016).

Hellim / halloumi cheese has a complex historical background dating back to Egyptian, and Roman civilizations and proving that it exclusively belongs to some country or nation is very difficult. In 2005, a German based enterprise Garmo AG filed an application for registration of a Community trade mark at the Office for Harmonisation (Judgement of the General Court, 2012), as they are producing hellim under brand Gazi Hellim in Germany. This resulted in case in the Court of Justice, where an organization protecting rights of halloumi producers based in South Cyprus had filed an opposition case against the registration, as earlier they have registered a "halloumi" as a collective community work mark (Welz, 2013), and hellim trademark would confuse consumers. As the final court decision in 2012 was to allow the German based company to use trademark hellim (Judgement of the General Court, 2012), the South Cyprus administration decided to register halloumi as a Protected Designation of Origin. PDO was the choice of the producers and association to secure that the traditional delicacy is produced only by Cypriots, as the trademark or collective community work mark does not secure that halloumi can only be produced in Cyprus following the strict quality requirements.

In 2009, the Republic of Cyprus launched an application for origin protection to the European Union (Welz, 2013), claiming halloumi cheese production belongs exclusively to Greek Cypriots, while Turkish Cypriot producers claimed that traditionally both communities are producing the cheese and awarding the right to produce it only to Southern Cyprus producers would discriminate the ones in the Northern part of the island. Finally, on 17 July 2014, the Commission received the official application for the

Jelgava, LLU ESAF, 21-22 April 2016, pp. 134-136 registration of the names 'Χαλλουμι' (Halloumi)/'Hellim' as a Protected Designation of Origin for a cheese made predominantly from ewes' and/or goat milk under the Quality Regulation (EU) No 1151/2012. The application covers producers from the whole island and foresees the protection of the name in the two languages, Greek and Turkish (Cyprus 'Χαλλουμι' (Halloumi)/'Hellim'..., 2015). This is a huge step and an improvement in the relationship between both communities, though the PDO process is not finalized yet in the beginning of 2016, as there are multiple objections filed against the case from businesses based in the UK, the USA and other countries.

3. Similarities and differences between production and marketing of Cyprus hellim / halloumi cheese

Author summarizes the main findings of a comparative study under sub-topics.

Producers

The majority of Cypriot cheese manufacturers in Southern Cyprus focus predominantly on the production and marketing of the traditional halloumi cheese (Cheese products, 2016). The sector is operated by large industrial companies that focus on export and many small producers dealing with local demand. According to statistics provided by the Cyprus Embassy Trade Centre in Berlin (2016), there are 53 halloumi producers in Southern Cyprus, distributed in all the regions.

Similarly, in the Northern part of Cyprus the hellim / halloumi is produced in large amounts and production sector is diverse- there are large industrial companies focusing mainly on export and very small, traditional producers dealing with local consumption. According to the Cyprus Turkish Chamber of Industry, there are 37 producers of milk and milk products, out of which 34 are producing hellim. A number of the companies dealing with hellim production is less than in Southern part of the Cyprus, however,

similar to Southern part, in Northern part hellim is the main product of the dairy industry.

The amounts produced

According to Ioannou and Theocharides (2009), around 62% of the milk produced within

Jelgava, LLU ESAF, 21-22 April 2016, pp. 134-137 the Southern Cyprus is used for halloumi production. Table 1 shows the author’s summary on the sales of industrial commodities by type in Southern Cyprus.

Table 1

Sales of halloumi cheese from manufacturing units (including exports), 2011-2013

Commodity	Year							
	2010		2011		2012		2013	
	Quantity (tonnes)	Value (thou EUR)	Quantity (tonnes)	Value (thou EUR)	Quantity (tonnes)	Value (thou EUR)	Quantity (tonnes)	Value (thou EUR)
Halloumi	11.230	75.108	12.987	81.431	12.840	86.187	14.727	98.613
Operation of dairies and cheese making (total)	100.027	213.224	103.370	218.514	99.222	220.667	94.932	227.454

Source: Statistical Service of the Republic of Cyprus (2016)

Sold quantities and value of halloumi cheese in Southern Cyprus have increased dramatically (Table 1). In 2013, the quantity has increased by 31% compared with 2010, while the value of halloumi cheese production has increased by 32%. Interestingly, in 2010 halloumi cheese amounts accounted for 11% of all operations of dairies and cheese making amounts, while in 2013 it has already increased to 16%, showing the growing importance of halloumi cheese production in the country.

In Northern Cyprus, according to the Cyprus Turkish Chamber of Industry, around 6000 tonnes of hellim are produced per year, which is less than half of the halloumi amount produced in the South. The importance of hellim in the local economy can be also shown by the following statistics- hellim accounts for over 20% of all the exports from Northern Cyprus, other dairy products account for 15%.

Local consumption

The excessive amount of halloumi in Southern Cyprus is consumed locally. Cypriots consume around 9 kg of halloumi per year (Ioannou, Theocharides, 2009), which accounts for around one third of all cheese consumption per capita per year.

In Northern Cyprus, even more fresh and mature hellim is consumed, reaching 12 kg per person per year (More than just..., 2012), which is 3 kg per capita more than in Southern Cyprus.

Export

According to statistics (Trade in Goods, 2014), Southern Cyprus domestic exports in 2013 were dominated by pharmaceuticals (28% of all domestic exports) and halloumi cheese, which accounted for 11% of all domestic exports. The total amounts and value of exported halloumi from Southern Cyprus is summarized in Table 2.

Table 2

Halloumi cheese export amounts and value from Southern Cyprus, 2012-2014

Product	Year					
	2012		2013		2014	
	Net mass (kg)	Value (EUR)	Net mass (kg)	Value (EUR)	Net mass (kg)	Value (EUR)
Halloumi	9.777.668	61.530.114	11.363.224	75.810.789	13.569.381	91.260.901

Source: Statistical Service of the Republic of Cyprus (2016)

During the analyzed period of time, exported halloumi amounts have increased by 39%, reaching an amount of 13.6 million kg exported worldwide (Table 2). The value of exported cheese has increased more dramatically, reaching 48% increase in 2014 compared with 2012. This

Jelgava, LLU ESAF, 21-22 April 2016, pp. 134-138 allows the author to conclude that halloumi cheese demand on the external markets has increased during the recent years despite the price increase.

Statistics from the Northern part of the island is summarized in Table 3.

Table 3

Hellim cheese export amounts and value from Northern Cyprus, 2012-2014

Product	Year					
	2012		2013		2014	
	Net mass (kg)	Value (EUR)	Net mass (kg)	Value (EUR)	Net mass (kg)	Value (EUR)
Hellim	-	17.517.877	-	26.262.795	5.797.510	26.844.819

Source: Cyprus Turkish Chamber of Industry (2016)

In 2014, the exported amount of cheese from Northern Cyprus reached 5.8 tonnes of hellim (Table 3), which is less than half of the amounts that Southern Cyprus exported the same year. Obviously, the capacity of the Southern part of the island is double the Northern part. Interestingly, the value of exported cheese is more than three times less than the value of the cheese exported from Southern Cyprus. This allows to conclude that the value of 1 kg of halloumi from the South Cyprus in 2014 is EUR 6.7, while 1 kg of hellim value is EUR 4.6. Northern Cyprus producers are selling their cheese for much lower price, both because of the competitiveness and purchasing power on the export markets.

Main exporters

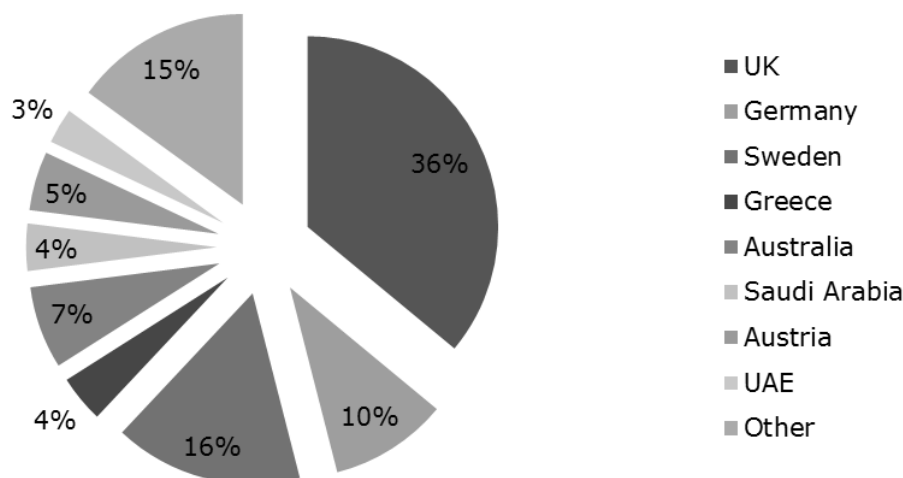
The Trade Service of Ministry of Energy, Commerce, Industry and Tourism (2016) has provided a list of the main exporters of halloumi cheese from Southern Cyprus. According to the available information, 15 halloumi producers currently export their products, the largest exporter being Charalambides Christis. Charalambides Christis (2016) exports its

products to 30 countries and stands as the largest exporter of dairy and cheese products, with the main export product being the traditional Cyprus halloumi. Products are distributed within most EU countries, the Gulf and Middle East, Russia, Australia and the USA as well as the South Korea and Taiwan. Other exporters are Dairy Products M. Loizou Ltd, Dairy Products Demetriou Ltd, Chrysostomos Elia & Sons Ltd and others.

Depending on the year, 10 or 11 companies from Northern Cyprus export hellim cheese. The biggest exporters from the Northern Cyprus are Koop Sut (Koop Dairy) (Koop Sut, 2016), which is the largest milk product producer processing 25% of all the milk in the North; Meric Sut Urunleri (Meric Milk Products), Reha, Buluc Milk Products and others.

Main export markets

In 2014, halloumi cheese was exported to 41 different countries from Southern Cyprus. The main export markets of halloumi cheese exported from Southern Cyprus are summarized in Figure 1.



Source: author's construction based on Trade in Goods, 2014

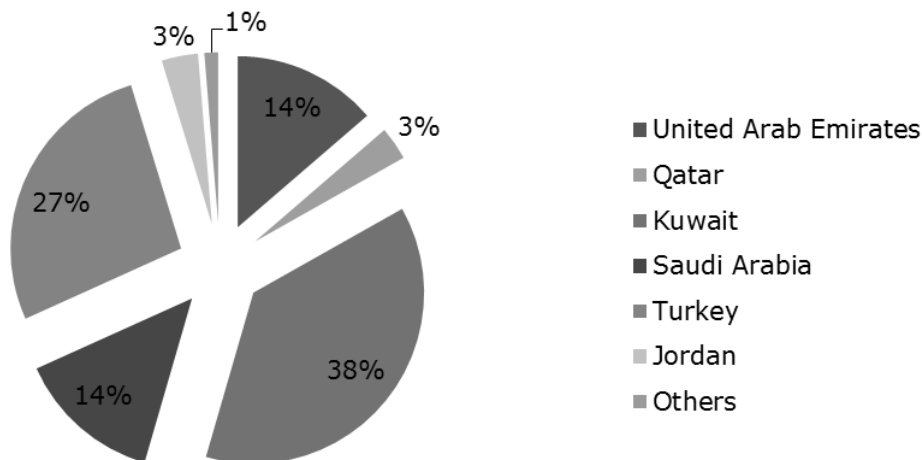
Fig. 1. Export markets of halloumi cheese from Southern Cyprus, 2013

The main export market of the halloumi cheese from Southern Cyprus in 2013 is the UK (Figure 1), accounting for 36% of all halloumi exports due to the high number of Cypriots living in the UK as well as celebrity chefs using the product and adventurous taste experiments by locals. Currently, the UK is the country consuming the highest number of halloumi cheese outside of Cyprus. Mainly Southern Cyprus halloumi exports highly depend on consumption by Cypriots living abroad in countries like Australia, the UK, Germany and others, rather than local consumers. Increasing amounts of exported cheese show that the consumers of halloumi cheese are not only Cypriots living abroad, but also local people. For example, Sweden is currently the country with high consumption of halloumi cheese, but low number of Cypriots living there. According to the Fontana company (Fontana, 2016), the largest halloumi importer from Southern Cyprus, Cypriot Halloumi cheese was introduced in Sweden by Fontana company in 1984. Back then, it was an

exotic delicacy that few had heard of. Today it belongs to one of the most popular cheeses, and is a given feature at barbecues across the country. Another countries halloumi cheese is exported includes Australia, Greece and other countries.

The main export markets of hellim cheese exported from Northern Cyprus are summarized in Figure 2.

In 2015 hellim cheese from Northern Cyprus is exported to 11 different countries. The main export market of hellim cheese is Kuwait, accounting for 38% of total hellim export as well as Saudi Arabia and Turkey. Other countries include America, Japan, Australia, Bahrain and Oman, where little amounts of hellim are exported. Compared with Southern Cyprus, the main target market of hellim cheese is different, and the focus of the producers from Northern Cyprus is not to introduce the hellim cheese to nations that do not know it but sell it to the Middle East and Western Asia countries, which originally are familiar with the cheese.



Source: author's construction based on Cyprus Turkish Chamber of Industry, 2016

Fig. 2. Export markets of halloumi cheese from Northern Cyprus, 2015

Export strategies

Southern Cyprus, with its efforts of obtaining geographical indications in the USA and Europe, is selling halloumi cheese as a pure Cypriot product. This is supported by Gibbs, Morphetou and Savva (2004), concluding that halloumi is promoted as the national branded product of Cyprus. Consumption in Cyprus is mediated through tourism that acts both to increase consumption and as a conduit to create export demand. This leads to conclude that Southern Cyprus producers are relying on extension strategy and country of origin as brand element. Extension strategy is used when products like halloumi cheese are offered unchanged on its export markets, and country of origin branding is a strong signal for product quality and attributes (Suh, Hur, Davies, 2015). One of the concerns using country of origin strategy is that "foreignness" of a product makes it less favourable to the customers (Balabanis, Diamantopoulos, 2014), especially when the opposite of preferences- consumer ethnocentrism- is showing increasing popularity amongst consumers. But as Adina, Gabriela and Denisa conclude (2015), a brand's country-of-origin can influence the brand's perceived positioning by reducing perceived risks, acting as

a guarantee and enhancer for the positioning strategy. Therefore, it can influence consumer buying decision process and offer a significant competitive advantage.

Contrary, Northern Cyprus is not relying on country-of-origin strategy, offering hellim cheese on the export markets while adapting to the local tastes, trying to make use of the fact that hellim cheese originally is known on its main export markets, though it is not widely popular. As Welz (2013) concludes, even in Turkey, which is the main export market of hellim cheese from Northern Cyprus, and the only country recognizing and approving hellim / halloumi trademark of Northern Cyprus, hellim is not explicitly marketed as a Cypriot product.

Conclusions, proposals, recommendations

- 1) The historical background of the hellim / halloumi cheese is complex and can be dated back to various ethnic groups and historical times. Nowadays, it is considered as a local delicacy in the island of Cyprus.
- 2) Hellim / halloumi cheese is a product with unique attributes, and due to its high melting point it can be very diverse when it comes to cooking and serving it. Interestingly, both communities of Turkish and Greek Cypriots agree on a recipe and features of it, as it is

prepared in the same way in both parts of the divided island.

3) To protect local producers and boost the economy of Cyprus, several applications to gain geographical indication for the hellim / halloumi have been submitted to the EU. The most recent application submitted in 2014 is unique, because it is the first time it is acknowledged that the right to produce hellim / halloumi cheese belongs to both communities living on the island- Greeks and Turks.

4) Southern Cyprus is characterized by larger production and export of halloumi cheese, and over the last decades the cheese has been successfully introduced in export markets mainly in the EU as a true Cypriot delicacy. Hellim producers from Northern Cyprus are

Jelgava, LLU ESAF, 21-22 April 2016, pp. 134-141 producing and exporting much less quantity, and focusing on selling the familiar taste to the Middle East and Western Asia countries.

5) The author undertakes comparative study to prove the hypothesis that there is no direct relationship between export markets and marketing strategies used by Southern Cyprus and Northern Cyprus hellim / halloumi producers. There are significant differences showed in the study, and it can be concluded that Northern Cyprus and Southern Cyprus are not direct competitors on export markets and it is suggested to obtain PDO together, as it would benefit both communities and the economy of the island.

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