TRENDS OF PORK AND POULTRY MEAT CONSUMPTION IN HUNGARY

NÉMETH, ANETT – VARGA, ANITA

SUMMARY

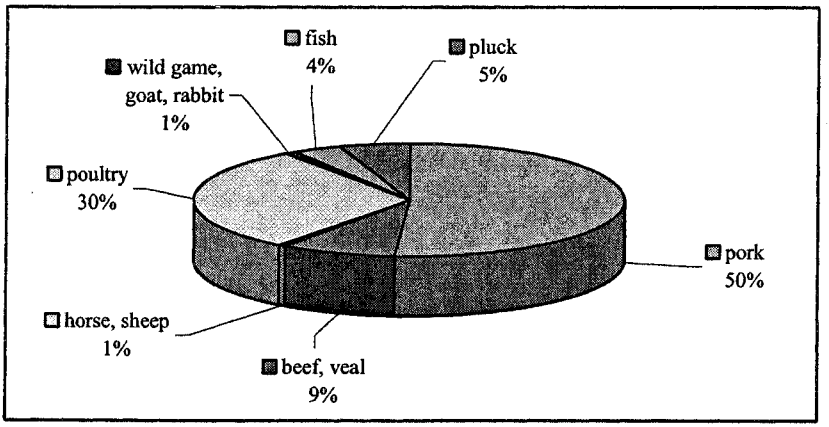
The consumption of poultry products has gradually risen during the past decade. Poultry meat is popular not only because it plays an important role in sound nutrition, but also because of it is cheaper than other kinds of meat. Consumers with a gradually decreasing income are especially sensitive to price changes. Also, according to more negative opinions say beef and pork contain much fat, fat contains much cholesterol, meat products made of them contain much fat, salt, and collagen, fat contains non-saturated fat acids, etc. The present unfavourable position of red meat and its negative effect in consumption derives mostly from the "cholesterol & BSE war", but the effect of price trends of certain meat products on consumption practice is also relevant.

TRENDS OF RAW MEAT CONSUMPTION IN HUNGARY IN INTERNATIONAL COMPARISON

Figure 1 shows the 1990 trends of consumption of different meat types in Hungary. Pork mounted up to 50% of the total meat consumption. Second most significant was poultry with 30%, followed by beef and veal totaling 9% all together. Of less importance were the ratios of pluck (5%) and fish (4%). In order to include all types of meat, game, goat meat, rabbit meat, horse meat, and mutton have to be mentioned with a figure of 1% each.

Figure 1.

Meat consumption trends in Hungary in 1990 (%)

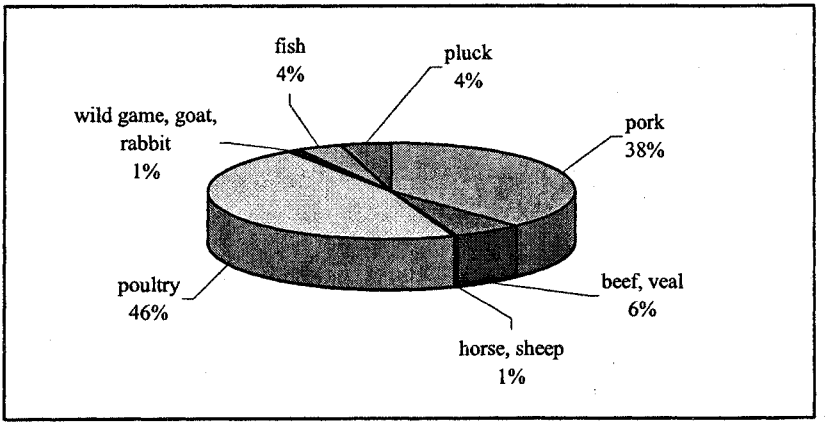


Source: the authors' calculation based on data of the Central Statistical Office

Figure 2 represents the meat consumption of the Hungarian population at the turn of the millennium, i. e. in the year of 2000.

Figure 2.

Meat consumption trends in Hungary in 2000 (%)



Source: the authors' calculation based on data of the Central Statistical Office

Out of the three most popular types of meat, pork and poultry meat have undergone the most significant changes as compared to 1990. However, the trends of these changes were opposite: in poultry consumption there was an increase of 16%, whereas in pork consumption a decrease of 12%. Beef and veal consumption has dropped by 3% during the past 10 years, which means that their popularity amounts only two thirds of the 1990 level. Meat consumption total per capita in 1990 and 2000 amounted to 75.8 and 74.7 kg, respectively. The year of 1997 was the worst year because by then meat consumption had fallen to 61.6 kg. In 2000, however, there was a significant increase of more than 10 kg as compared to the previous year (64.3 kg).

The meat consuming habits of Hungarian consumers greatly differ from those of EU citizens, since they eat by 30% less meat than the latter. In 2000 the citizens of the European Union consumed on the average 95.1 kg pork, poultry meat and beef, of which the ratio of beef was 20% of this figure (19 kg), that of poultry meat 35% (33.1 kg), and that of pork 45% (43 kg). However, this ratio is only true for the EU (10): in the United States meat consumption per capita exceeds even that of the European Union. Americans consume much more beef (43 kg) and less pork (23), and poultry meat consumption amounts to 42 kg. The difference in greater beef consumption can be explained also by the difference in eating habits.

Table 1.

Consumption data of the three most widely consumed meat types in 2000

Qty: kg/capita/year

	USA	EU	Hungary
Pork	23	43	28.5
Beef, veal	43	19	4.4
Poultry meat	42	33.1	34.4
Total	108	95.1	67.3

Source: the authors' calculation based on data of the Central Statistical Office

TRENDS OF PROCESSED MEAT CONSUMPTION IN HUNGARY

On the domestic market consumers prefer poultry meat and least like beef. This situation can be explained by the recent livestock health scandals which firstly affected the beef industry, then pork production, and recently the producers of poultry, especially chicken. The consumption of domestic products seems the easiest solution, since in all the scandalous cases meat was of foreign origin.

About 70% of primarily processed poultry products consist of chicken, 20% of turkey, and the remaining 10% of duck and goose. On the market of secondarily processed products, however, the situation is different, since turkey plays a more and more important role. There was no major change in the structure of pork products: the demand for both fresh and processed products has increased, whereas there was only a more moderate increase in the marketing of smoked products, especially of sausages.

Table 2.

Favourable opinion trends of processed meat products in Hungary

	1999	2001
Cold cuts, ham	76%	81%
Dry sausages, salami	76%	77%

Source: GFK Hungaria Institute of Market Research

THE POPULARITY OF MEAT PRODUCTS IN HUNGARY

The consumption of red meat has been on the decrease during the past years. The market research institute GFK Hungaria conducted a public opinion poll among in respect of their meat preferences. Between 1997 and 2001 beef preference has dropped from 44% to 37%, that of veal from 32% to 27%, and that of game from 29% to 27% (i. e. by 2%). It deserves attention that among the different kinds of meat and meat products only two categories managed to be among the top ten favourite foods: since poultry was mentioned by 95% of consumers as their favourite, it enjoys the widest popularity;

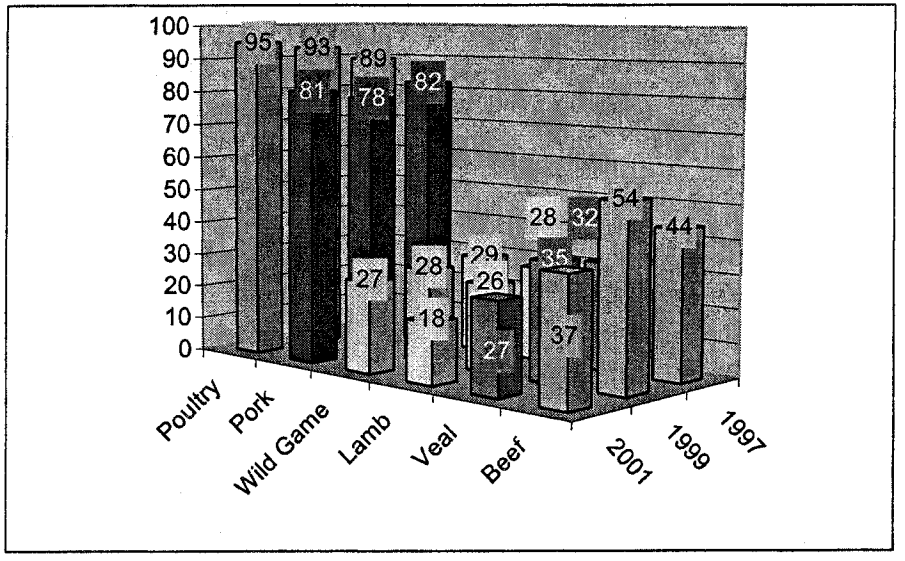
and cold cuts constitute the other favoured meat type, which is number ten among the most beloved kinds of food. The investigation of meat types that above or below average popularity among the groups of the population would result in the fact that almost everybody likes poultry consumption (12).

The "upgrading" of poultry was promoted by its relative cheapness, the demand for a healthy diet, the widening of the range of processed poultry products, the spread of fast food restaurants, and the emergence of the demand for oven-ready products (8).

In Hungary the big winner of the domestic animal epidemics in Western Europe was the poultry sector, since consumers have become more inclined to buy poultry meat. This is clearly indicated by Figure 3 which shows the changes in preference of meat types in Hungary in the years of 1997, 1999, and 2001. The popularity of beef has dropped to 37%, pork has remained at the same level, while the popularity of poultry has increased from 89% to 95%. Meat is typically men's food, which is demonstrated by the fact that among those who favour meat, men are in majority as opposed to women (GFK Hungaria). The only exception is poultry, where the situation is opposite.

Figure 3.

Meat preference among adults in Hungary (%)



Source: GFK Hungaria Institute of Market Research

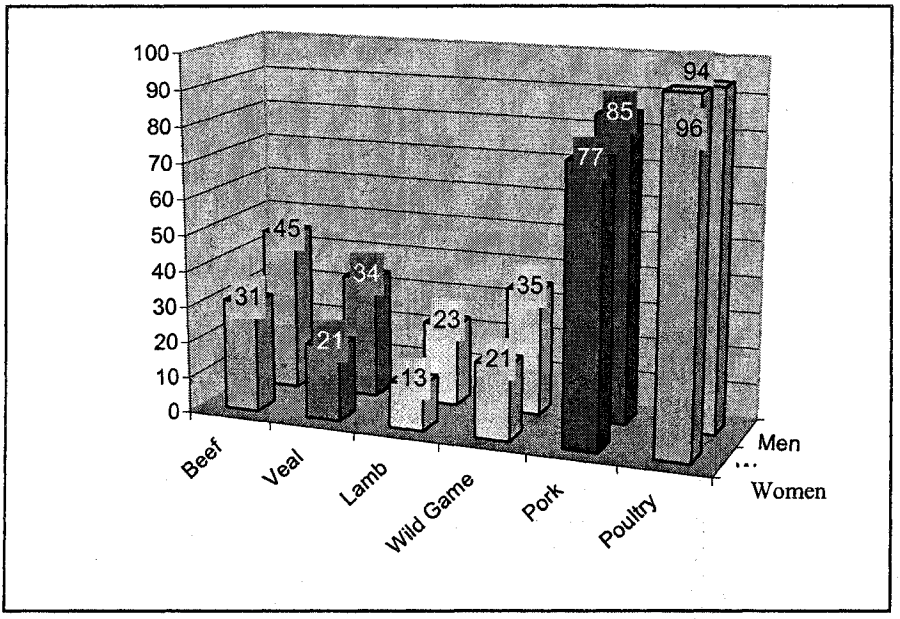
DIFFERENCES IN PEOPLE'S OPINION ACCORDING TO SEX

Figure 4 shows the difference between men and women in their opinion of meat consumption. There are marked differences in the popularity index of beef (men 45% - women 31%), veal (men 34% – women 21%), and lamb (men 23% – women 13%). As for pork, the difference is significantly smaller, women's preference being 77% and

men's 85%. Poultry meat shows deviation from this trend, since 96% of women and 94% of men favour it. Figure 4 also indicates that the population's most preferred meat – irrespective of sex – is poultry, which is supported by the fact that the most widely consumed kind of meat is that of poultry. Pork follows after it, which is consumed on the average once a fortnight in Hungarian households.

Figure 4.

Meat preferences among men and women in Hungary in 2001 (%)



Source: GFK Hungaria Institute of Market Research

OPINIONS OF THE KINDS OF MEAT BASED ON THE RESULTS OF SURVEYS

Pénzes (2001) has detected that pork has a bad reputation among society. Pork consumption reminds the consumers of traditional Hungarian food, overweight, a number of diseases, high fat content, and a filling, substantial effect. One of the decisive factors of the decrease in pork consumption consists in the decline of living standards and the increase in real prices. Due to their price, quality measures and stability, and soundness poultry meat & products were set before pork and beef products by people questioned (3).

Personal income as a factor of consumption

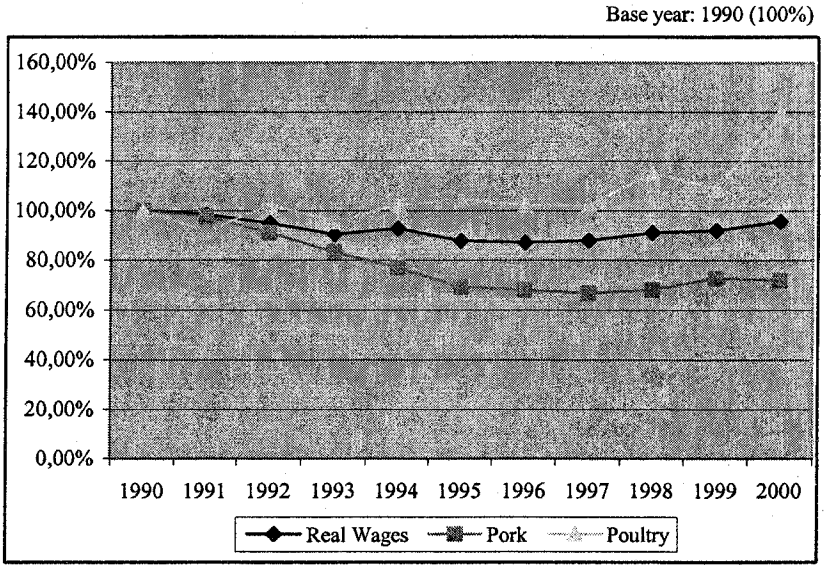
Among poultry meat consumers, a consumption level well over the average can be detected among people with a net monthly income of more than 160.000 HUF, university graduates, and people living in Pest county, central Hungary. Pork is favoured mostly by people living in small villages having a population of

less than 2000, traditional consumers, and gourmets. Households with a higher income prefer also products processed to a higher degree and oven-ready products, in which respect poultry industry has an advantage as compared with beef and pork processing (12).

Among the different kinds of meat, it is pork that is mostly affected by personal income (4). The ratio of money spent by different income categories on meat consumption largely depends on whether a given household buys or produces the food in question. One quarter of all butcher's meat is produced in households, this ratio being highest among middle-class families. The fact that domestic demand largely depends on income leads to the conclusion that pork consumption will only moderately increase along with the expected rise in living standards. Consumer habits have greatly changed during the past decade, in consequence of which chicken consumption has increased among the different kinds of meat (5).

Figure 5.

Trends in pork and poultry consumption in Hungary as related to real wages



Source: the authors' calculations

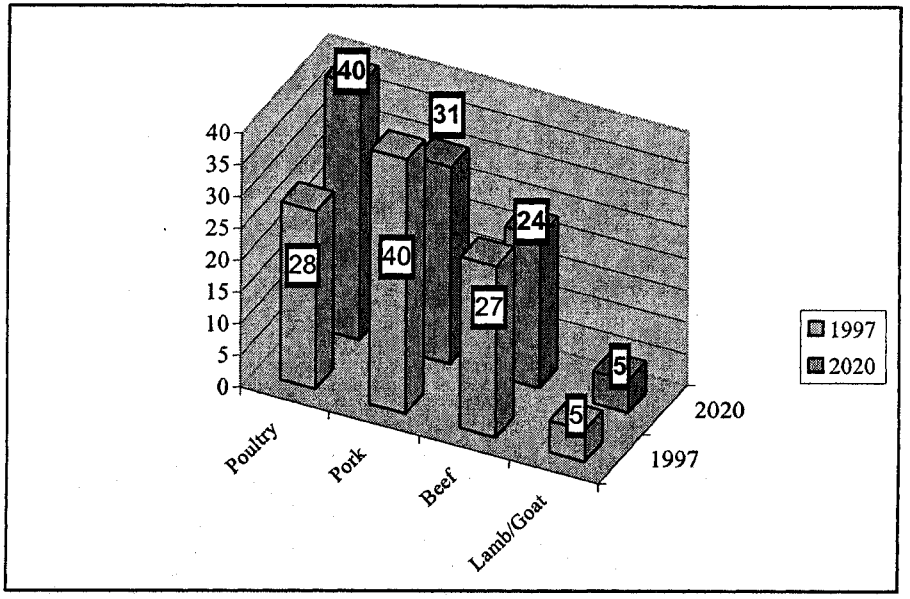
Figure 5 shows that real wages were on the decrease in the 1990s. Pork consumption has followed this trend, whereas there was a significant rise in poultry meat consumption. The graph indicates an ambiguity in the consumption of these two kinds of meat: while poultry meat consumption exhibits a significant rise, pork consumption has sharply dropped parallel to the decrease in real wages.

World food markets will undergo considerable changes in years to come. The different rates of increase in population will result in the rearrangement of consumer and production centers. The importance of areas of low and medium income will expand, which means that

the significance of poultry, as one of the least expensive and most available source of protein, will continue to increase (1).

Figure 6.

Expected changes of the structure of meat consumption in the world (%)



Source: International Food Policy Research

CONCLUSION

A basic duty and interest of the meat industry is the expansion of the domestic consumption of various meat products. Current consumption levels are influenced by economic factors (prices, wages), on the one hand, and consumer habits, on the other.

- Poultry meat preference can be explained by its relatively low price, since Hungarian consumers are very sensitive to prices because of their poor earning conditions.
- Between 1990 and 2000 a continuous decrease of real wages took place in Hungary. This phenomenon had an unfavourable effect on pork, which is more expensive, whereas in case of the cheaper poultry meat there was in increase of consumption.
- Along with the poorer, there is also a new group among poultry consumers, which is characterised by health consciousness, a relatively high income, and the demand for reprocessed products.
- Pork consumption could accelerate if there were a variety of products processed to a higher degree, similarly as in the case of poultry.

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ADDRESS

Németh Anett
PhD hallgató
Nyugat-Magyarországi Egyetem
Mezőgazdaság- és Élelmiszertudományi Kar
Agrárökonómiai és Társadalomtudományi Intézet
Agrárgazdaságtani és Marketing Tanszék
9200 Mosonmagyaróvár, Vár 2.
Tel.: 96/566-663, Fax: 96/566-647
E-mail: nemetha@mtk.nyme.hu

Varga Anita
PhD hallgató
Nyugat-Magyarországi Egyetem
Mezőgazdaság- és Élelmiszertudományi Kar
Agrárökonómiai és Társadalomtudományi Intézet
Agrárgazdaságtani és Marketing Tanszék
9200 Mosonmagyaróvár, Vár 2.
Tel.: 96/566-663, Fax: 96/566-647
E-mail: vargaa@mtk.nyme.hu

SERTÉS- ÉS BAROMFIHÚS FOGYASZTÁS ÁTALAKULÁSA MAGYARORSZÁGON

NÉMETH ANETT – VARGA ANITA

A baromfitermékek fogyasztása fokozatosan növekedett az elmúlt évtizedben. A baromfihús népszerűségét az egészséges táplálkozásban betöltött szerepén kívül a többi húsféleségnél kedvezőbb ára is tovább növeli. A fogyasztók romló jövedelmi körülményeik között különösen árérzékenyek. A kedvezőtlenebb vélemények általában azzal kapcsolatosak, hogy a marha- és sertéshúsban sok a zsír, a zsírban sok a koleszterin, a belőlük származó húskészítményekben sok a zsír és a só, sok a kollagén, a zsír telített zsírsavakból áll és így tovább. A vöröshúsok mai előnytelen pozíciója – és ennek a fogyasztásra gyakorolt negatív hatása – nagyrészt a „koleszterin- és BSE-háborúban" gyökerezik, de nem hagyható figyelmen kívül az egyes húsféleségek áralakulásának a fogyasztásra gyakorolt hatása sem.