Poultry meat trends and consumer attitudes

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Abstract

The growth of world consumption of meat and meat products is noteworthy, not only for its scale but also for its constancy. Despite several health crises it has remained stable in recent years. All the branches of this sector have benefited, including beef, but in the 1990s poultry proved to be the most attractive. In 1995 it became the meat with the second highest consumption world wide, after pork but ahead of beef.

How can this practically universal success of poultry be explained? What are the main factors appealing to consumers of this type of meat? Can their buying behaviours and consumption attitudes be altered by a context that seems to be lastingly affected by the presence of avian flue?

This paper proposes some answers to these questions by taking into account the international dimension of consumption, its geographical diversity and its historical evolution. The analysis is based essentially on quantitative data and statistical trends.

Four series of factors underlie consumers' attraction to poultry.

First, owing to its highly competitive price compared to other meats, to the absence of cultural and religious obstacles to its consumption, and to its dietary and nutritional (protein) qualities, this meat is consumed on a mass scale throughout the world.

Second, during the various health crises consumers' attention focused on breeding methods (feed, animals' well-being, etc.) and on the reliability of information. Interest in 'approved local' products, whose appeal is based on the credibility-taste combination, has consequently spread in Europe.

Third, consumption has developed around more elaborate products incorporating two types of service: a saving of preparation time ('ready-to-eat' food) and a diversification of places of consumption (catering outside the home).

Finally, it is these processed products that have most successfully withstood the various health crises (including avian flue). It seems that the complexity of industrial production has introduced a distinction, in consumers' eyes, between poultry (the entire animal) and meat-service merchandise.

Keywords: poultry ; consumption ; consumer attitudes ; quality ; avian flue

Introduction

Growth of world consumption of meat and meat products[1] is noteworthy, not only for its scale but also for its constancy over a long period. This growth has continued in recent years in spite of successive health crises. All types of meat, including beef, have benefited from positive trends but the steepest increase in consumption has concerned poultry.

In terms of market share, poultry meat has gained ground at the expense of beef and, to a lesser extent, mutton. With a mean annual consumption of 12.3 kg/capita (in 2004), poultry has (since 1995) become the meat with the second highest consumption world wide, after pork (16 kg/capita/year in 2004) but ahead of beef (9.7 kg/capita/year in 2004). It was the meat that had the fastest growth-rate in the 1990s (5% per annum).

How can this practically universal success of poultry meat be explained? What are the main factors appealing to consumers of this type of meat? Can their buying behaviours and consumption attitudes be altered by a context that seems to be lastingly affected by the presence of avian flue?

This paper proposes some answers to these questions. In order to take into account the international dimension of consumption, its geographical diversity and its historical evolution, the analysis is based essentially on quantitative data and statistical trends[2].

I – Poultry meat: a 'globalized' consumer product

Throughout the world consumers are increasingly attracted to poultry meat. This growth in consumption is determined by a number of quasi-structural, clearly identified factors. The main factor is the large demand for cheap animal protein. Compared to other meats, the competitiveness of poultry is unquestionably one of the main reasons for its success[3], and that competitiveness is constantly improving. 'FAO figures show that poultry meat prices in international markets dropped by 45% from 1994 to 2002. Only pork experienced a similar trend (-36% from 1994 to 2003)'[4]. Consumption is also related to people's income levels and is therefore sensitive to the general economic situation of a country. For example, the recent revival of poultry meat consumption in Russia and Eastern Europe has been associated with an improvement in the general economic situation.

Poultry also benefits from a universal tradition of production and consumption. In particular, the absence of religious obstacles facilitates the geographic expansion of its consumption. Hence, poultry meat is not only consumed more and more, it is also consumed throughout the world. The highest consumption rates have been recorded in industrialized western countries, with the US ranking first. The steepest increases have been in Asia and South America (+8% per year). The growth potential remains high in these areas, where consumption levels vary widely, thus reflecting disparities in buying power. In 2004 the US was the world's largest consumer of poultry meat per capita (53.4 kg/year). China, the world's second largest consumer in terms of volume, has substantially lower individual consumption levels (10.3 kg/capita/year). Brazil ranks second, world wide, in terms of individual consumption (33.3 kg/capita/year), followed by Mexico (26.1 kg/capita/year). The European Union of 25 ranks fifth (22.6 kg/capita/year in 2005)[5].

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[1] For a complete and recent review of world levels of consumption, the reader is referred to USDA (2006).

[2] None of these statistical data are a product of the author's research. They are drawn from various documents cited in the references. I wish to thank Pascale Magdelaine (ITAVI) and Marie-Paule Spiess (UBIFRANCE) who provided me with various documents which I used extensively. On a more ad hoc basis I also referred to qualitative studies, especially OFIVAL-CSA (2003) and ITAVI-GEM (2005).

[3] For an econometric demonstration in the case of Brazil, see Rumeno Piedade Bacchi and Silva Spolador (2002).

[4] Cited by Magdelaine (2003). [our translation]

[5] In 2005, 23.2 kg/capita/year.

Table 1 Meat Poultry Consumption in the World (1000 tec)

	2000	2001	2002	2003	2004	2005	% 2005*/04
Total World	69,213	71,951	74,612	76,394	78,559	80,366	+ 2.3
United States	13,568	14,046	14,818	15,078	15,525	15,858	+ 4.1
China	13,385	13,225	13,807	13,831	13,373	23,585	- 3.0
EU **	8,143	8,658	8,673	8,839	10,638	10,650	+ 0.4
Brazil	5,344	5,628	6,156	6,008	6,273	6,697	+ 3.3
Middle East***	4,785	4,876	4,999	5,559	5,821	5,784	+ 3.4
Russia	1,672	2,200	2,299	2,215	2,281	2,556	+ 5.4
Japan	1,910	1,876	1,877	1,853	1,784	1,646	- 10
Mexico	2,252	2,374	2,592	2,653	2,740	2,853	+ 4.1
South Africa	973	1,013	1,038	959	943	971	+ 3

Sources: OFIVAL, based on data from GIRA, FAO, European Commission – In ITAVI (2004)
* Estimations
** EU of 15 members until 2003, then 25
***Including North Africa

Table 2 Meat Poultry Consumption per Capita in the World (Kg/Hab/Year)

	2000	2001	2002	2003	2004	% 2004*/03
Total World	11.4	11.7	12.0	12.1	12.3	+ 1.2
United States	48.1	49.3	51.5	41.8	53.4	+ 3.1
China	10.5	10.3	10.7	10.7	10.3	- 3.5
UE	21.5	22.8	22.8	23.1	23.2	+ 0.3
Brazil	31.9	32.9	34.7	32.7	33.3	+ 1.7
Middle East**	12.5	12.5	12.5	12.9	13.0	+ 0.8
Russia	12.7	15.2	15.9	15.5	16.4	+ 5.9
Japan	15.0	14.7	14.7	15.0	13.5	- 9.8
Mexico	22.5	23.3	25.1	25.6	26.1	+ 1.7
South Africa	22.3	22.7	22.7	23.9	24.0	+ 0.8

Sources: OFIVAL, based on data from GIRA, FAO, European Commission – In ITAVI (2004)
* Estimations - **Including North Africa

Relatively low and competitive prices compared to other meats, the absence of cultural or religious obstacles, and dietary and nutritional (protein) qualities are the main factors explaining poultry meat's attractiveness. It has become a mass consumer product throughout the world: in every region, in countries with very different levels of development, and in diverse forms.

The importance of these factors, especially prices, is expected to remain stable in coming years. Yet other factors of attraction have started to appear or even to impose themselves, especially in the industrialized countries. For instance, in the US poultry is rarely sold whole and raw; products are processed more and more, thereby incorporating a growing number of services. There is thus a very strong tendency to consume increasing complex products and to widen the ranges offered.

This tendency complicates the understanding of consumers' attitudes and preferences. The rest of this paper is devoted to its analysis, primarily in light of current trends in the European market.

II – Between risk aversion and striving for quality: the attractiveness of 'local certified' products

From the late 1990s a new factor boosted the growth of poultry meat consumption: the BSE[6] crisis. Poultry was the main beneficiary of the decline in beef consumption, as European consumers were attracted to the 'reassuring' meat of an animal species unaffected by the disease. The case of Germany is a typical example: its poultry consumption rose from 12.8 kg/capita/year in 1994 to 18.5 kg in 2004. Part of that increase was related to consumers' new preferences regarding meat products.

[6] Bovine spongiform encephalitis.

Various health crises have shifted consumers' attention towards breeding and feeding methods and towards the reliability of information and the veracity of labels. This attention has triggered the development of products with several characteristics distinguishing them from 'globalized' poultry. They can be defined as 'local certified' products.

First, their quality is associated not only with the characteristics of poultry and its meat, but also with the conditions of production (feed, movement, surface area per animal, etc.). Second, information on these characteristics is conveyed to the consumer on labels, via a system of traceability. This information is guaranteed by the control of an independent (certifying) body. Thus certified, these products have a higher degree of credibility. In the market they take advantage of crises in consumers' confidence in food products, by offering a substitute for other meats, and in very acute crises they survive better than 'anonymous' products. Consumer attitudes are clearly guided by a need for assurance which they associate with better identification of products and their origin, of producers, and of distribution channels.

Yet the power of attraction of local certified products is based not only on an aversion to sanitary risks; it is more complex than that and combines several qualities, primarily the credibility of information and the quality (taste) of meat. As regards sanitary security, consumers consider such products to be more 'worthy of trust', more credible than standard products, especially because of the proximity to their place of production. When it comes to quality, they associate the taste, texture and other aspects of quality with less intensive breeding (higher slaughter age, surface per animal, etc.). In France, 'Label Rouge' chicken is a certified product that has existed for a long time but has now become emblematic. It is copied on a European scale by similar quality labels to which consumers are attentive.

Certified products give a relative competitive advantage to local or regional (even national[7]) products since they are (partly) excluded from price competition. This advantage is evident in two respects.

First, in the short term their market share has become large and is increasing. To be sure, the share of 'standard' poultry still predominates in most European markets (for chicken, over 60% of the offer in super- and hypermarkets in Belgium, and between 40% and 50% of the offer in Spain and the UK). But, as M.P. Spiess (2005) points out, today these products – in the UK (Assured Chicken Production, Quality British Turkey), in Germany (Qualität und Sichereit), in the Netherlands (IKB chicken and IKB turkey), in Belgium (Belplume) and in Spain ('pollo corral') – are benefiting from consumers' new awareness of food security, traceability and animals' well-being. Spiess claims that consumption is sometimes difficult to quantify because the offer is dispersed and mainly heterogeneous (very different terms of reference), but that the proportion of certified poultry could account for between 15% and 25% of the main European markets.

Second, in the medium term we are witnessing the redefinition of what in marketing is called the market core, represented until now by 'standard' poultry. Economists refer to the 'reference offer' to denote the type of product which, in a particular market, defines the quality standards in relation to which all the other products are de facto positioned. In the consumers' eyes the reference product, the one that serves as a yardstick for establishing their criteria and judging the various products in the range, is the whole chicken.

In most large European markets chicken is still preponderant. Its consumption has often increased during sanitary crises, whereas the consumption of other poultry has stagnated or declined. Even if products made from turkey are increasingly common, consumption levels remain relatively weak (a mean of 5 kg/capita/year in the 15-member European Union, against 15.5 kg/capita/year for chicken).

Above all, the whole chicken is the founding species, representative of all poultry. It is the chicken, and especially the whole roast chicken, that lends the strongest symbolic image to the poultry family. Consumers' attention and demands are focused on this 'noble' product, close to agricultural production. This is all the more significant in light of the fact that, as we shall see below, the share of whole chicken in European consumption is declining.

[7] A manifestation of this movement is the recent multiplication of references to the national or regional origin of products (shop shelves with national flags, 'Buy British' slogans in the UK or 'I nostril polli sicuri' in Italy, etc.).

Owing to its leading position this product has an important advantage. Consumers consider it legitimate to practice a strong qualitative differentiation on chicken (reflected in considerable price differences) but not on the other types of poultry.

On the other hand, whole chicken has to face two major problems today. It suffers from a handicap as regards regular consumption: its preparation time. The whole chicken is increasingly reserved for particular occasions when time is taken 'to cook', to prepare a 'festive' meal. By contrast, in situations of daily consumption, where the product's practicality is decisive, chicken pieces or prepared chicken are preferred (see below). Moreover, because of its image the whole chicken, directly associated with that of the live animal, is exposed to the 'shock' reactions by consumers in cases of public alerts. An obvious example is the periodic plummeting of sales following announcements on avain flue. The impact of these announcements is particularly strong since one of the factors used to promote local certified chicken meat – the (relative) freedom of free-range chickens – is called into question.

III – From consumer information to quality signals: consumers' "cognitive equipment"

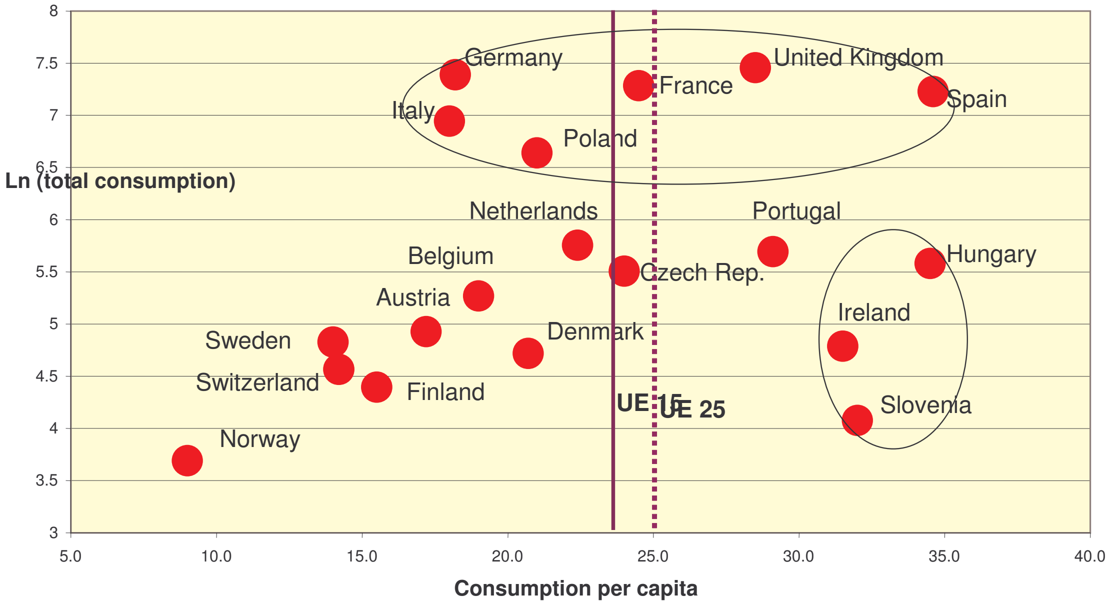
Poultry is the meat with the second highest consumption in the European Union, after pork which tops the list by far. Individual consumption levels vary widely within Europe: Hungary has one of the highest levels of consumption, with over 35 kg/capita/year, while the level in Spain, the UK and Portugal is around 30 kg/capita/year. Germany and Italy are far below the European average which, in the 25-member EU, is 23.2 kg/capita/year (figure for 2005).

For about ten years, from 1993 to 2003, per capita consumption increased in almost all countries of the then 15-member EU. Today, in the 25-member Union, growth is accounted for mainly by consumers in the ten new member states. It is nevertheless starting to run out of steam. Changes in consumption patterns following the BSE crises, to the detriment of beef, are no longer perceptible, and households' buying power is tending to shrink.

Figure 1 Overview of European poultry meat consumption

Source: UBIFRANCE[8]

[8] From Spiess (2005).



In this 'mature' market[9], the growth of consumers' interest and even demands as regards information on products themselves, on their origins, their producers, their production methods and so on is exponential.

The problem for consumers is consequently the following. At the time of purchase (and even consumption), nothing enables them to recognize a product that was produced in particular conditions in terms of the animal's well-being, environmental protection or the absence of certain processes (biotechnology, ionisation, etc.). Nor can they be sure that the information provided on the product is reliable. They rely on the information supplied by the producer or distributor, and on its exactitude, accessibility and credibility. Moreover, their ability to fully understand the information received is often limited.

The problem is therefore not simply to receive information, but also to have synthetic references, summaries of knowledge, short-cuts to data. The marking of products with quality signals (commercial labels of industrial manufacturers or leading distributors, official certifications of quality, various logos and claims, etc.) is an answer to this problem. Marking is a 'cognitive equipment' designed to build trust by associating the quality of a product with the quality of its producer and/or seller.

A study[10] undertaken in 2003 in France shows the importance granted by poultry consumers to quality signals, in addition to direct information on the product or its use. Respondents state that the Sell By Date is by far the most important information as far as they are concerned (70%). The name of the piece is also considered a priority and ranks second (43%), along with official quality labels (Label Rouge, etc.). Official certification of quality is associated with credibility (of the information, the level of safety, etc.), while the name of the piece relates to a preference concerning taste. The packaging date and origin are both in third position (27%).

With a score of 19%, the brand name ranks sixth[11]. This explains why distributor brands have grown so fast. According to M.P. Spiess (2005), this growth is found throughout the European Union, following the British model. In the UK distributor brands account for up to 90% of fresh chicken sales. These brands are predominant in Northern Europe: 90% of poultry meat in the Netherlands and Denmark, for example. In Belgium they top the list of frozen meat sales and can exceed 70% of fresh packaged meat sales.

[9] That is, which has reach a growth rate that is weak or nil, or even negative.
[10] Cf. OFIVAL (2003).
[11] No other type of information exceeds 5% (including colour, for instance).

IV – From poultry to poultry meat: services embedded in products

Services embedded in products constitute another, fairly recent dynamic factor appealing to consumers. The consumption of poultry meat is developing primarily around two main types of consumer service: an economy of preparation time (the 'ready-to-eat') and a diversification of places of consumption. Catering outside the home combines both of these aspects. Its expansion is regular: in the UK its share in poultry consumption is estimated at 27%, in Germany around 20%, in Belgium 12% and in France 18%.

The economy of preparation time naturally relates to the fact that activities which hitherto were domestic (preparation by the housewife) or carried out by the local tradesman-distributor (cutting up by the butcher), have been shifted to industrial workshops[12]. A growing proportion of the poultry consumed is processed. This form of meat accounts for close to one third of poultry consumption in Belgium, 27% in the UK, between 20% and 25% in Germany and 20% in France.

It is naturally the functional aspect of these product-services that appeals to consumers. Breaded pieces, sausages and brochettes have been present in all markets for several years, including in the new member states of the European Union. In countries with a strong cold meat tradition (Poland, Slovenia, Germany, Belgium) a wide range of poultry-based cold meats has existed for a long time. In certain markets, which M.P. Spiess (2005) describes as avant garde, such as the UK (the largest processed food market in Europe), convenience foods are increasingly common (marinaded or spiced preparations, cooked or ready-to-cook products, etc.). With 'snacking', products that are more convenient to use are developing (in cubes, slices, etc.).

Note that these products are also developing as a result of consumers' growing awareness of dietary characteristics. The 'health' argument of poultry, which has a comparatively low fat content, is used more and more by agri-food firms and public authorities in the campaign against obesity, and therefore has a strong impact on consumers.

Table 3 Degree of processing of chicken in the super-and hypermarket of 2003

	Whole	Deboned	Processed products
United Kingdom	11%	31%	58%
Belgium	20%	36%	44%
Germany	9%	55%	36%
Italy	15%	65%	20%
Netherlands	10%	85%	5%
Spain	60%	35%	5%

Source : Ubifrance 2003 - In Spiess (2005)

With the exception of France and Spain, whole chickens now account for a very small proportion of overall consumption, as opposed to almost 50% in the late 1980s. (In Italy, for instance, the whole chicken accounts for 16% of consumption, against 45% fifteen years ago.) This change in consumer behaviour has also affected frozen products. Traditionally consumers in the countries of Southern Europe (Spain, Italy) have always preferred fresh poultry meat. The same now applies to other European markets as well, where the growth of poultry consumption concerns fresh meat, to the detriment of frozen products. This trend is clearly visible in the Netherlands and Germany, where the sale of fresh produce has exceeded that of frozen meat for the past two decades at least.

As regards consumers' perception of poultry meat, these trends confirm a significant new phenomenon. It seems that the complexity of industrial production has, in consumers' eyes, introduced a strong distinction between the animal (as a whole) and the 'meat(pieces)-services' merchandise. Should we see this phenomenon, qualified by sociologist C. Fischler[13] as the 'de-animalization' of meat, as an explanation for the resistance, or even impermeability, of these types of product to the

[12] Over the past two decades European poultry meat buyers have switched from butcheries to supermarkets. The most striking examples in this respect are those of Northern European countries and especially the UK. Thirty years ago 60% of fresh meat (of all kinds) was still bought in butcheries, against 15% today and less than 6% in the case of poultry.
[13] FISCHLER, C. (1990), *L'Homnivore*. Editions Odile Jacob, Paris.

otherwise devastating effects of sanitary crises? It is truly remarkable that, to date, the growth of processed poultry products has been unaffected by these different crises, including avian flue, while the sale of whole chickens has recently plummeted.

Table 4 Revision of the FAO 2006 Poultry Meat Outlook in light of developments of Avian Influenza
Project change from previous 2006 estimate

Consumption (1000 metric tonne)	2003	2004	2005	2006p	2006r	Change from 2006p	% Change
World	76,734	78,643	82,024	84,632	81,819	-2813	-3%
Africa	3,939	4,034	4,147	4,269	4,067	-202	-5%
North America	15,960	16,563	17,034	17,447	17,291	-156	-1%
Central America/Carr	3,998	4,101	4,342	4,548	4,548	0	0%
South America	9,576	10,084	10,837	11,507	11,227	-280	-2%
Asia	27,904	27,909	28,953	29,513	28,896	-617	-2%
Europe	11,292	11,629	11,851	12,067	10,727	-1340	-11%
Oceania	895	911	950	991	991	0	0%
CIS	3,166	3,410	3,906	4,291	4,068	6223	-5%

Source : FA0, 2006

Conclusion

In coming years consumer attitudes towards poultry meat will be closely related to trends in two areas that are still largely uncharted.

The first obviously concerns the H5N1 avian flue epidemic. In 2006, as in 2005, poultry meat purchases have been closely related to the evolution of this epidemic. Consumption, especially in Europe, is marked by negative jumps correlated to the geographic advancement of the epizootic towards the west of the continent and the extensive media coverage of the phenomenon. It now seems that this association will be a structural characteristic of the market in the coming years. FAO projections for 2006 estimate a 3% decrease in world consumption and a 10% decrease in European consumption[14]. The impact varies widely from one EU member country to the next. ITAVI (2006) shows that Greece and Italy have been the hardest hit, with record drops in consumption levels. In Belgium poultry sales have declined by 20% to 30% – a trend that has primarily affected whole chickens. In Germany the drop in sales in February 2006 was 20% for whole chickens. In Poland, sales decreased by 30% in March 2006. Although no case of avian flue has been detected in Spain, consumption seems to have declined by about 10%. Finally, the UK is an exception, with a stable consumption of poultry products.

These observations confirm the fact that consumers' attitudes are highly sensitive to their perception of risks. At the same time, it seems that consumption levels can recover fairly quickly from sudden dips. This may mean that, during an epidemic, volatile consumer behaviour is to be expected rather than a global, sustained decrease in consumption. The diversity of reactions between different countries nevertheless still raises questions on European consumers' perceptions of risks and their consequent attitudes, and on the impact of media announcements, especially when they are intended to be reassuring. Likewise, divergent attitudes towards different types of meat (whole product / processed products) warrant more in-depth analysis.

The second area that is still largely unknown concerns the determinants of consumer behaviours. As we have seen, poultry meat has become a highly processed product but one which, in terms of image, still relies on a sound reference product: the whole chicken. This meat is therefore able to attract consumers, lastingly it seems, on the basis of several qualities: services, health, taste and conviviality. The scope of this article has not enabled us to discuss this point, but we know that consumption patterns are increasingly differentiated[15] in relation to age group, household size, buying power, cultural origins, etc.

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[14] Cited in OFIVAL, 2006: 4.

[15] For the case of France, cf. the study ITAVI-GEM (2005).

This differentiation is not necessarily easy to analyse, but another type of question seems more important here. Faced with a plethora of possibilities, outlets, products and types of information, how do consumers make their choices? How do they rank their preferences? These questions are particularly difficult to answer since, as F. Ascher[16] put it, today's consumer is 'an eclectic eater' whose rules of action are grounded in diverse and sometimes contradictory logics.

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