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Consumer attitudes toward meat consumption in Spain. Special reference to quality labels and kid meat.

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Overview of my presentation

- 1.- A brief introduction
- 2.- Meat presentation in EU and Spain
- 3.- A reference to the goat sector
- 4.- Characteristics of sheep-meat and goat-meat
- 5.- Consumer preferences in EU and Spain
- 6.- Quality labels value
- 7.- A sensorial panel with consumers in Seville
- 8.- Conclusions

Introduction

Meat is an excellent source of high quality proteins. It contains essential aminoacids, minerals (Fe, Mg) and B-vitamins.

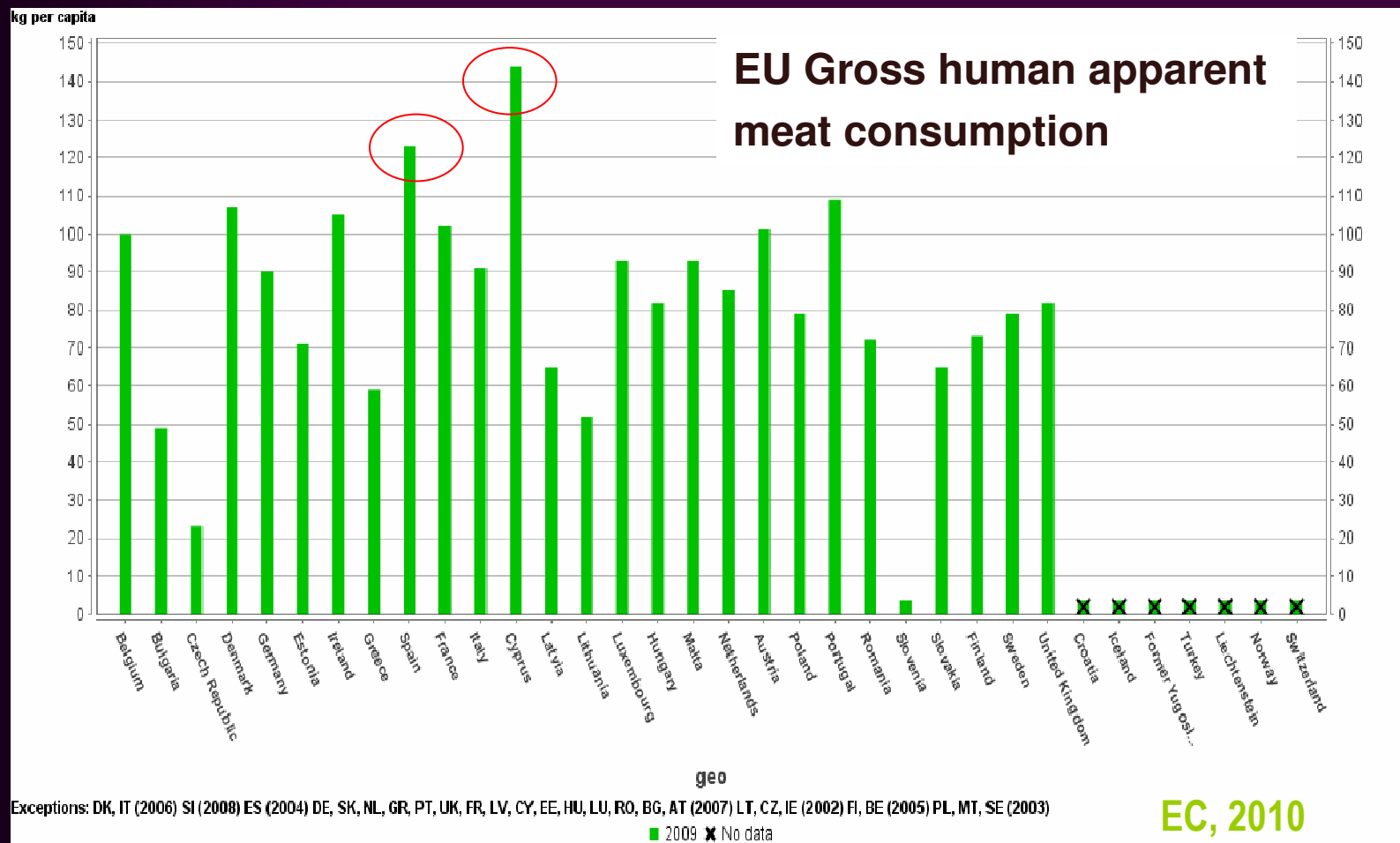
As a nation industrializes, its meat consumption increases.



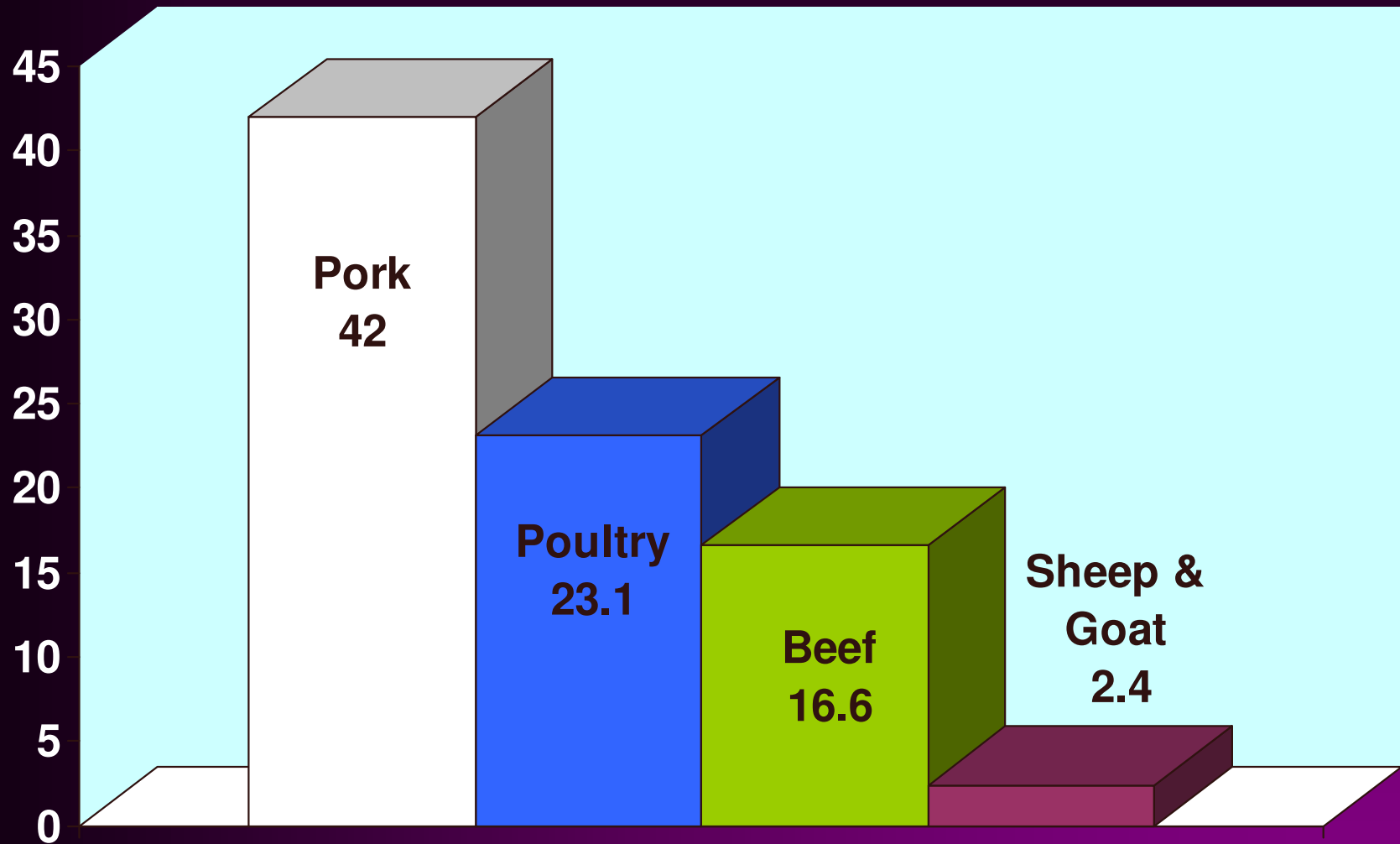
Meat consumption

 **World:** 40 kg per capita

 **EU:** 94.7 kg per capita



Meat consumption by species in EU



2008 (EC, 2010)

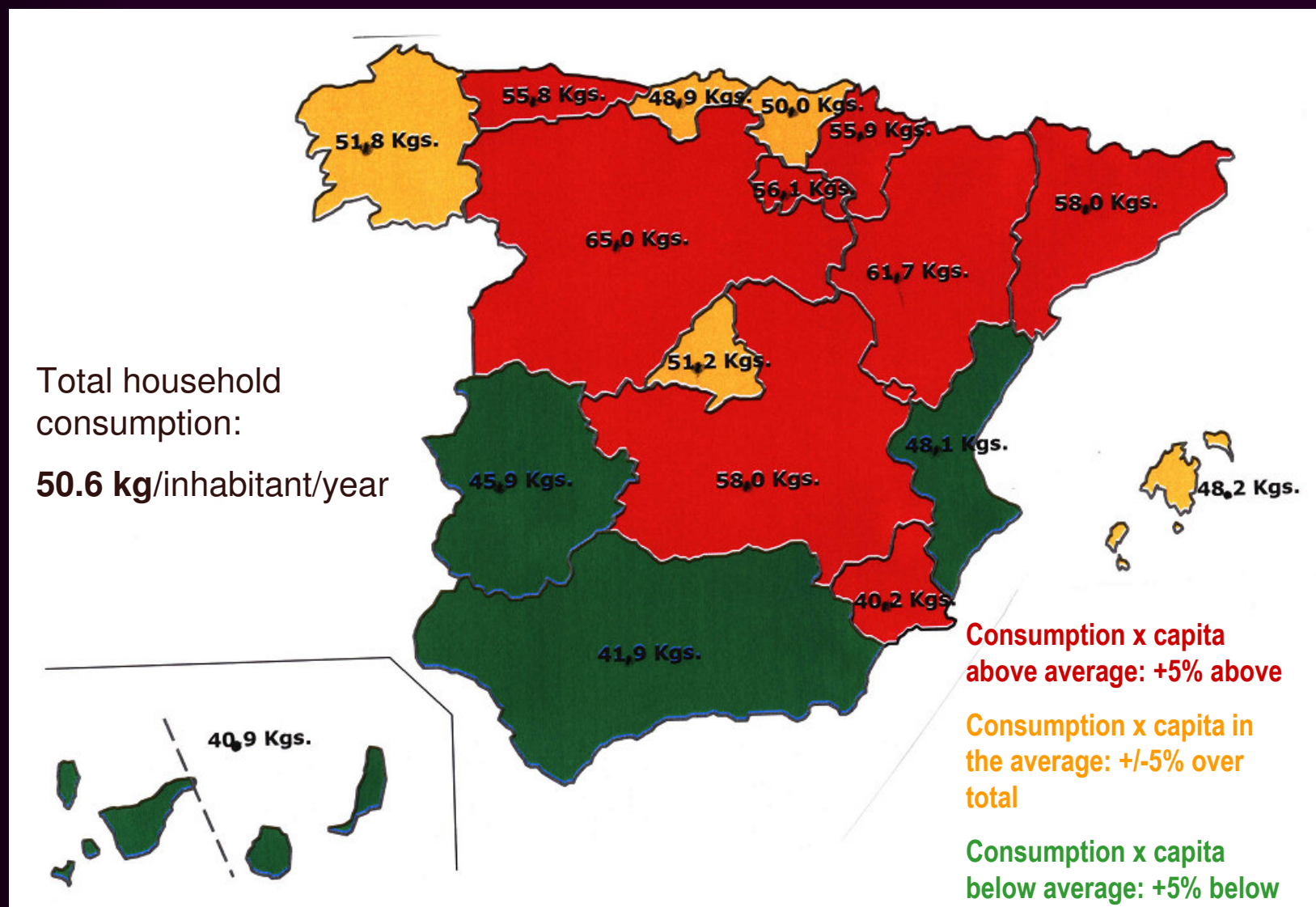
Meat consumption in Spain

Kg per inhabitant and year	
Household = 50.6 (78%) 15.9% of the expense in the Spanish household consumption	Fresh: 38.4 (5.9 quality-labelled) * poultry: 14.3 * pork: 11.6 * beef: 7.2 * sheep-goat: 2.5 Frozen: 0.9 Meat products: 11.4
Extra-domestic = 14.7 (22%)	

2008 (MARM, 2010)







**Meat demanded in Spain:
pale, lean and from young animals**

Meat household consumption in Spain



2008 (MARM, 2010)

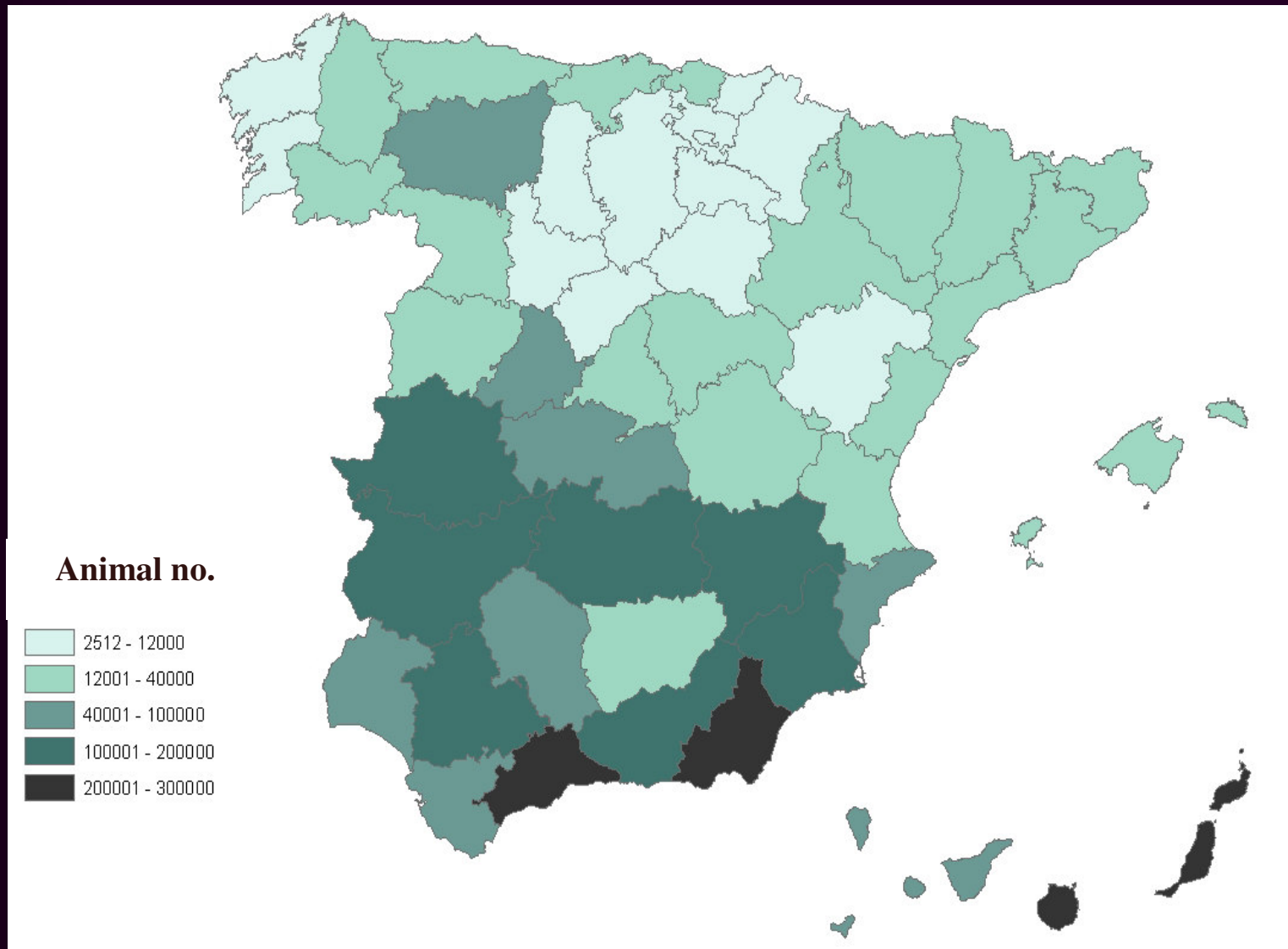
Sheep & Goat sector

-  In statistics, they often appear both joined
-  EU sheep and goat production have decreased:
 -  Partial decoupling of direct payments
 -  Structural changes
 -  Production abandonment
 -  Lower output recorded in Spain and France.

Specifically goat.....

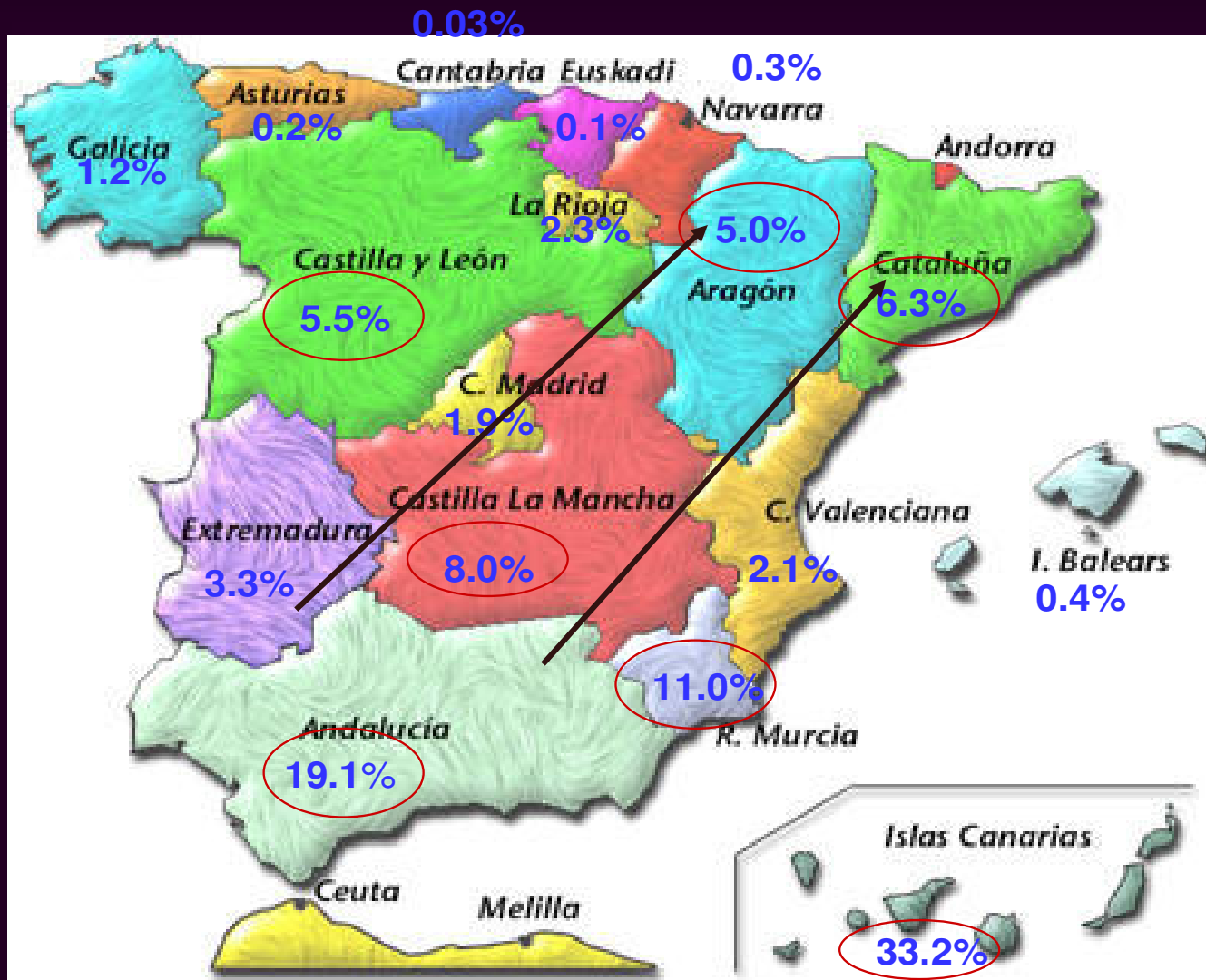
- In EU-27, in 2008, the 13.5 millions of goat heads are unequal distributed. Greece had 37.1% and Spain 22.1%.
- 77.400 tonnes goat-meat production in EU, Greece and Cyprus together registered 53.4% production, Spain 11.9%.
- Low participation into the total livestock production.
- Essential to preserve the environment on rural areas.
- Improves farmers' livelihoods.
- An increase of the intensification of the system practices towards milk-production is registered in Spain.

Goat effectives distribution in Spain



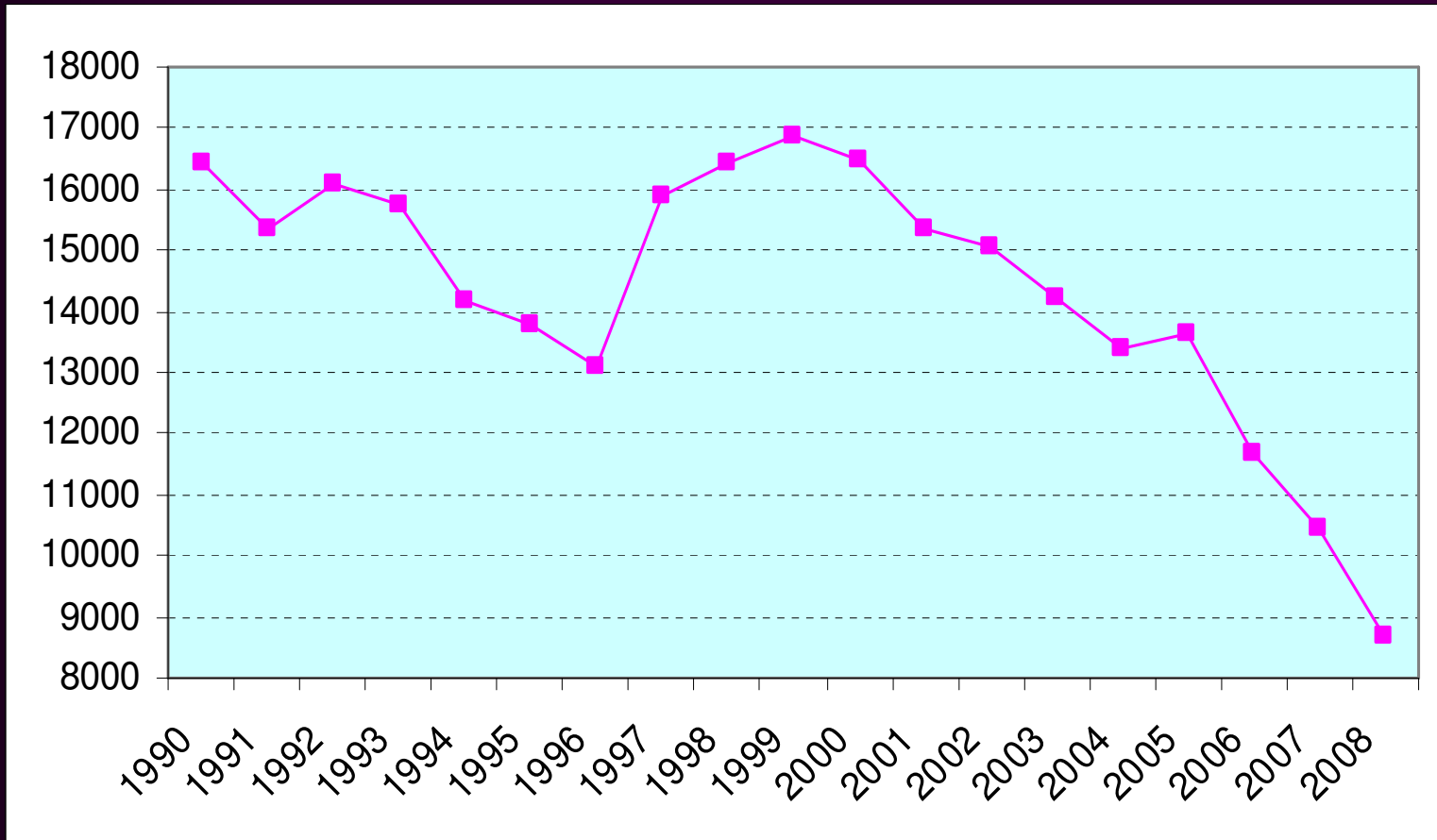
2008 (MARM, 2010)

Goat Meat production in Spain



2008, (MARM, 2010)

Evolution of the Goat Meat production (tonnes) in Spain



(MARM, 2010)

Sheep-meat and goat-meat consumption

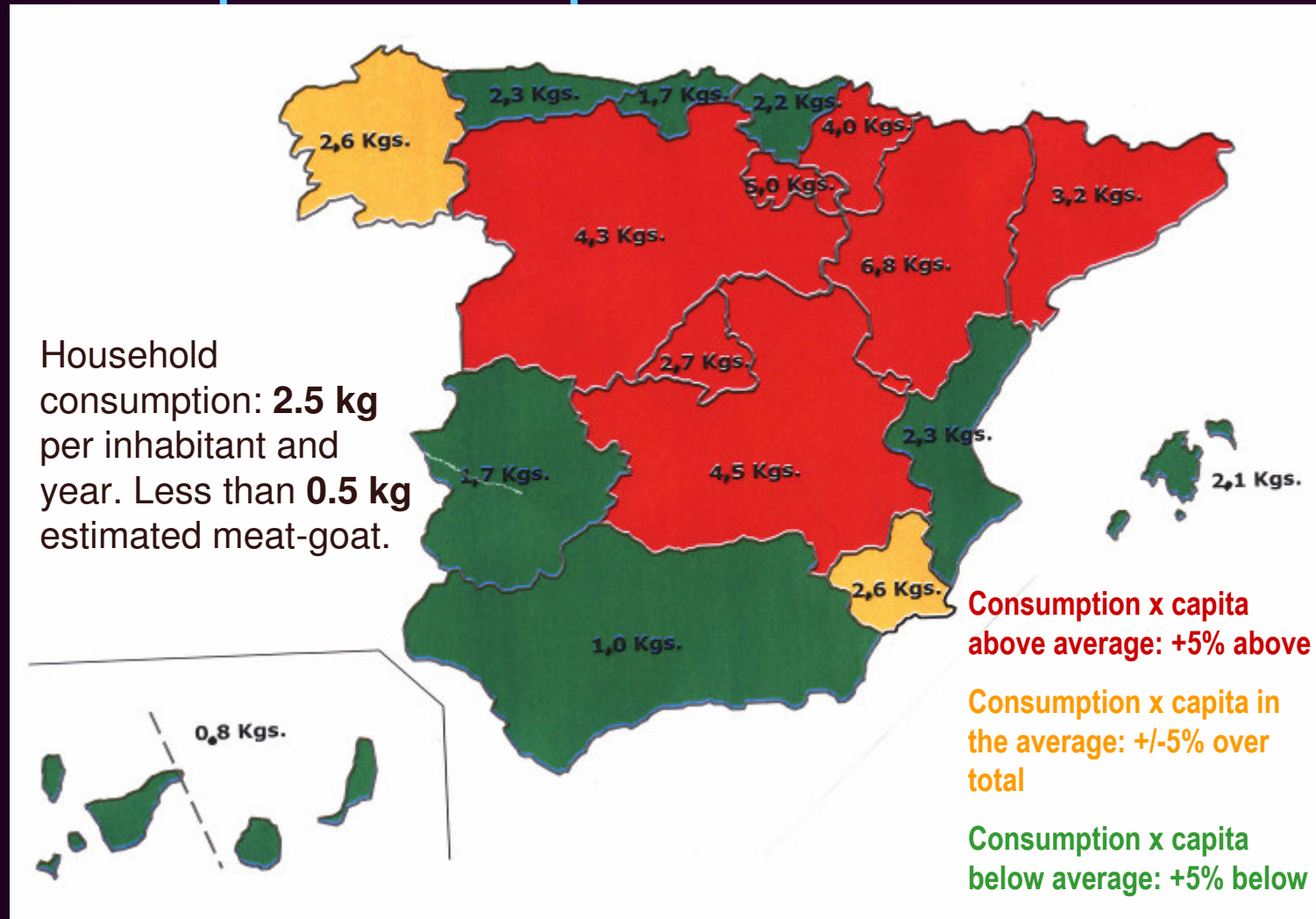
■ EU sheep and goat meat consumption have fallen:

- tight profit margins
- relatively high prices
- weak domestic demand

■ Also in Spain consumption has fallen

- Great differences between regions

Sheep and goat meat household consumption in Spain



2008 (MARM, 2010)

Only 5% of the total meat consumption corresponds to these meats.


What, when, how?

- Goat suckling kids. Slaughtered with 8-10 kg live weight and 35-45 days.
- Appreciated for its natural origin, flavour and taste.
- Half of the consumers associate Spanish meat production systems with environmental protection (MARM, 2008).
- Special festivities.
- Consumption in December is twice of any other month: Christmas.
- Roasted or grilled. Fewer stewed.




European Consumers demands

Eurobarometer survey (2006):

Public would like more information

-  * safety of the food products (50%)
-  * environmental effects of farming (30%)
-  * welfare of farm animals (25%)

Reasons for buying food products

-  * healthier (50%)
-  * better quality (48%)
-  * taste better (35%)

Consumers appear to accept a higher production cost to achieve these aims

Purchase's habits of Spanish consumers

(MARM, 2008)

- Traditional shop (38.7%): confidence and quality
- Higher consumption in small towns (less than 10.000 inhabitants)
- Household that eat more meat are...:
 - Housewife between 50 and 64 years old
 - More than 3 members
 - Medium-aged or older-aged children
 - Couples without children
- Mainly retailed meat (83.9%), but packaged in rise
- Final choice: price (55.7%) and quality (51.5%)
- Reasons for eat meat: taste (64.7%), balanced diet (39.7%)
- Most of the consumers prefer national origin (88.5%). Why?
 - Taste (44.4%)
 - More confidence and safety (30.3%)

Spanish consumers attitudes

(MARM, 2010)

- Changes in lifestyle have brought about consumption pattern:
 - Lack of time
 - More women working out of house
- Meat is considered healthy food: chicken the best (7.0), pork the least (5.6) (scale from 0 to 10)
- Meat is considered an expensive food, the most beef and sheep-goat
- More information about the product (6.8) and more recipes at the disposal of consumers would increase sales.
- Semi-prepared meat products and traceability are opportunities for the industry.
- A great part of the consumers don't know the existence of any meat quality label.

Quality labels

- Consumers demand high quality products.
- Quality attributes: geographical origin and breed.
- Quality labels guarantees quality and food safety and they seem to be a key for the future
- 104 Protected Geographical Indication (PGI), quality label recognized in the EU:
 - 28 quality-labelled lamb (6 from Spain)
 - 5 quality-labelled kid (all of them from Portugal).
- Great geographical differences in the labelled-meat consumption:
 - highest in the north (Asturias, 10.72 kg)
 - lowest in the south (Andalucía, 2.46 kg).

Spanish Quality Labels




- 17 PGI **fresh meat**, mainly beef
- 8 PGI others meat products
- 5 PDO and 1 PGI dry-cured ham
- 26 PDO and 1 PGI cheese
- 2 PDO and 1 PGI honey
- 2 PDO butter
- 2 PGI fish
- 1 PDO mollusk (mussel)

19% of the economical value of the quality-labelled products (2007), after cheese.

10% of the economical value of the quality-labelled meat correspond to lamb-meat.






No PGI for goat, only one regional quality label

Specifically goat...

-  Great lack of knowledge about goat production systems
-  Great potential market for suckling kid in the same way as market for suckling lambs.
-  Overall acceptability from suckling kid meat was quite comparable to high quality products such as Spanish PGI lamb.

A study case:

Consumers test in Seville

-  Aim: to investigate the effect of breed and carcass weight or lactation procedure on consumers' appraisal
-  7 breeds
 -  2 dairy breeds (maternal milk or milk replacer)
 -  5 meat breeds (heavy or light carcass weight)
-  Target: Sevillian consumers. No habit of consumption existed.

Consumers test in Seville

Dairy breeds



Maternal milk or milk replacer
4 kg carcass weight

Meat breeds



4 kg or 7 kg carcass weight
Maternal milk

Consumers test in Seville

- Home test
- 15 families of at least 3 members each
- 14 consecutive weeks
- Consumer tested all types of samples in a balanced design
- Attributes: overall appraisal, taste, tenderness, juiciness.
- High punctuations (about 7); hence, a good acceptance, in contrast with the initial opinion, mainly due to lack of knowledge, not habit and not availability at market.
- No differences between breeds for heavy kids
- Breed differences for light kids
- High family effect: some consumers liked very much the meat and others didn't like at all.

Conclusions

- Measures are also needed to protect traditional products' names from around the world and inform consumers about authenticity of products.
- In order to increase meat consumption it is necessary to fit supply and demand, also perhaps with meat “ready to take away”.
- It is important to increase efforts to define market supply through suitable labelling.
- Labelling of meat in itself is not sufficient, it is important to inform consumers about the production systems and cooking ways.
- And finally a suitable promotion and marketing of the meat is essential and needed.

Thank you

