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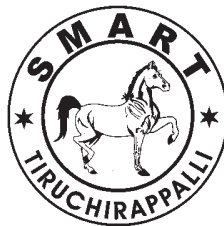
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CONSUMER BEHAVIOR TOWARDS MEAT AND MEAT PRODUCTS

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Abstract

As a result of WTO agreement, plethora of international brands being dumped into the Indian meat market, and increased demand at a decelerating rate for meat and meat products in India, has caused many Indian meat marketers, both unorganized and organized, branded and unbranded, to go deep into the study of perceptions and expectations as well as the consumption pattern of their meat consumers in order to make their selling and marketing efforts meaningful. In this survey-based research article, the author has made an attempt to step into the shoes of the meat marketer to know the consumer behavior and prescribe some strategies to face the imminent competition from global leaders in this market.

Introduction

Based on WTO's Cancun 2003 ministerial meet, the competition from foreign meat brands like AFG of China, Boca, Tombstone, and Cowboy of USA, Compofrio of Spain, Norson of Mexico, Animal of Poland, Jean Coby of France, etc., (Cowan. 1998) are likely to swamp Indian market in the near future. Ever since the Poultry Corporation of Andhra Pradesh became dormant, the private sellers and supply chain have been malfunctioning. Attempts to maintain the quality of chicken, mutton, fish, and eggs to the standards stipulated by Indian Food Adulteration Act, Meat Food Products Order (MFPO) and FPO which insist on sanitary requirements, limits of heavy metals, preservatives, insecticides, residue etc., place further constraints on Indian meat market (Gujral, Raman. 2004).

Need for the present study

The survey results of consumer behavior towards meat (chicken or mutton) are of great interest to the breeders, farmers, abattoirs, processing industry, retailers, traders, Andhra Pradesh State government and other enterprises involved in the fresh meat supply chain for

product development, quality, price, promotion, and distribution.

Objectives of the study

1. To study consumers' purchasing and consumption behavior towards meat and meat products
2. To analyze the structure of the meat distribution chain
3. To find out the causes for the gap between the consumers' perceptions and consumption pattern towards meat
4. To suggest strategies for marketing for meat and meat products in Chittoor district of AP

Summary of findings

The following is the summary of the findings of the survey based on a simple random sample of 200 consumer respondents from Chittoor district, rural and urban areas, of Andhra Pradesh:

I. Pattern of meat purchase and consumption

Butcher shops are important places of purchase for all except affluent consumers who buy frozen items from supermarkets. Many

households prefer chicken during winter and mutton during summer. Chicken, eggs, mutton, and fish are competitors to each other.

Besides these, of late, mushrooms of 'First Choice' brand from Wiekfield Company are emerging as a competitor to these products.

Table 1: Projected consumption of eggs and meat (in '000 tonnes)

	Year	2000	by 2015		by 2030	
	* LIG	*HIG	LIG	HIG	LIG	HIG
Eggs	1880	2086	2889	3664	3566	4770
Meat	5335	5918	8196	10396	10118	13533

*LIG – Low Income Group; * HIG - High Income Group

The per capita consumption of meat in India is 2 kg as against 4 kg in South East Asia, 4 kg in China, 35 kg in Australia and New Zealand, 44 kg in USA and 60 kg in Argentina. As per the recommendations of National Institute of Nutrition (NIN) of ICMR, National Egg Coordination Committee's targeted figures are shown in Table 1. The per capita consumption of meat in India is just one kg contrary to the NIN's recommended 10.8 kg, indicating a big gap between actual and recommended consumption. However, though the importance of meat in the balanced diet is well recognized, the demand for meat is decreasing in India in general. The findings of the present survey are as follows:

1. 80% of the consumers agreed to the statement that meat is an essential item of food when guests and relatives come home and also during occasions of alcoholic consumption.
2. It is also found that urban consumers are buying meat with more frequency than the rural consumers. 50% of both rural and urban consumers are buying meat once in a week while 45% of rural and 35.7% urban consumers buy meat thrice in a week.

3. The most important factor is the perceived status of meat: lower the perceived status of meat, lower the meat consumption.
4. Indian consumers consume more meat if they consider smell of meat as an eating quality attribute.
5. Employed consumers tend to have lower meat consumption than unemployed consumers.
6. Respondents' education has a significant impact on the consumption frequency. Higher the education, lower the consumption of meat.
7. Meat consumption of households is determined by the size of the household: the larger the household, higher the frequency of meat consumption.
8. The older respondents rarely consume meat.
9. The interest in food information was identified as an important determinant of meat consumption especially during occasions.
10. If price of mutton increases over hundred and forty rupees per kilogram, they switch their loyalty to chicken and egg consumption. 95% of rural and 100% of urban consumers agree that the price of chicken is affordable when compared to mutton. Accordingly 86% of rural consumers

and 75% of urban consumers accepted that the price has impact on the quantity they buy while 93% of rural consumers and 87% of urban consumers noticed price drop in poultry meat in the recent past.

11. Consistent with the behavior of Indian meat consumer, the consumers in Chittoor district also have reduced their meat consumption during the last five years due to fear of anthrax.

II. The structure of the meat supply chain

Traditional shops (independent butchers) account for 90% of fresh meat sales. In addition, direct sales from poultry farms are still an important source of trade, especially in rural areas. Only chicken farms have state level associations and national level federation.

Super markets in the district are also selling ready-to-cook and ready-to-eat meat foods in packets preserved in cooling machines. The most popular meat brands in India are AI-kaber (Bombay), Venky's (Bombay), Nandu's (Banglore), Sumeru (Cochin), and Godrej's Fine Dine (Bombay) and they market different products such as chicken samosas, fingers, nuggets, spring rolls, cutlets, breaded fillets, kebabs, butter chicken/mutton, chettinadu, dhaba chicken/mutton and chicken vindaloo in 250 gms-350 gms packets.

III. Consumers' expectations and perceptions

1. The 'place of purchase' is used to indicate both perception and the assessment of quality/safety of meat. Traditional butchers play a very important role in this district where 90% of consumers expressed a trust in 'their' butcher. Those consumers, who regard themselves as being able to assess meat quality through visual inspection, are normally older than those who perceive themselves as being not able to do this.

2. 'Flavor' and 'tenderness' are the most important attributes for the eating quality of mutton while 'flavor' and 'smell' are considered as the most important quality attributes for chicken. Consumers are concerned about fat and cholesterol in the case of both chicken and mutton while it is antibiotics and, hormones in the case of fish and eggs. They attach minor importance to safety stamp of local municipal authorities on the body of slaughtered animal though it is widely used for mutton.

3. Access to safety standards to both sellers and consumers is totally absent in this district as they are not made available by the government across the State.

4. Many of the customers are confident that non-vegetarian recipes prepared at home are safe.

5. Many customers rightly believed that liver is high in proteins and they wanted to get at least a piece of it in their meat purchase.

6. Compared to beef and pork, the frequency of chicken and mutton consumption is less influenced by attitudes but by intrinsic and extrinsic cues and attributes.

7. Only 23% of rural consumers and 9% of urban consumers preferred to buy live birds while 77% of rural and 91% of urban consumers preferred to carry home dressed chicken. But they insist on processing in front of them.

8. 25% of the rural consumers and 13% of the urban consumers have misconceptions about chicken consumption causing body heat and diarrhoea.

9. 16% of urban consumers are interested in telephonic order system and 18% of rural and 11% of urban consumers are interested in dressed and packaged door delivery system.

10. 48% of rural and 34% of urban consumers opine that chicken is not available as and when they want while 79% of rural and 79% of urban consumers opine that chicken is available at the nearest point.

11. 77% of rural and 35% of urban consumers opine that hygienic conditions at supply centers are not good. Most of the butcher counters are located on side canals and bodies of the goats/ birds dangling from hooks are surrounded by houseflies making the scene filthy and unhygienic.

12. 80% of consumers feel that taking meat on Saturday (Lord Balaji's day), Friday (Goddess Lakshmi' day), and Thursday (Saint Shirdi Sai Baba's day) is a sin and hence they do not consume meat on those days.

13. 50% of women in meat consuming families do not consume meat as they feel guilty of eating animals but they cook meat for their family members.

IV. Suggested Marketing Strategies

Many strategies can be developed for the marketing of meat in terms of 4Ps of marketing mix i.e., product, price, placement and promotion:

1. The cues or indicators of quality used by consumers in buying and eating meat are classified as intrinsic factors (e.g. flavor) and extrinsic factors (e.g. quality assurance labels). These should be provided to consumers by the marketers. Marks like 1, 2, and 3 or A,B, or C have to be given on the butcher's individual chambers to denote 'high quality', 'medium quality' or 'poor quality' respectively in order to help the customers.

2. The place of purchase, in particular the butcher shop design, may improve consumer confidence as this is the most trusted information source for the consumer. Private quality policy has to rely

more on the communication by selling personnel and less on labels or brands.

3. Consumer prices of live and dressed chicken are to be published in local newspapers. Discount may be offered on coupons purchased in advance, on bulk purchases, on evening purchases and on institutional purchases. Premium prices may be offered on telephone orders, home deliveries, boneless meat and specified limbs.

4. Retail outlets are to be maintained hygienically and round the clock. Modern weighing systems are to be introduced to take care of small and bulk customers.

5. Frequent consumer education is to be carried out by State level associations and federations through print and electronic media about nutritional values of meat and for minimizing sociological and religious misconceptions about meat consumption.

6. Explore the possibility of selling birds to the institutional buyers like defense, industry, education, hospitals, railways, etc.

7. Establish the processing plants to cater to the needs of regular and occasional buyers and to supply processed meat to retail outlets and also for door delivery.

8. Wide publicity is to be initiated for the consumption of frozen chicken which is more hygienic and has more shelf life. The agencies like APEDA, NECC, NAFED and MARKFED should undertake marketing programs such as films, exhibitions, poultry meals, van publicity, distribution of boiled eggs, adding eggs and meat in midday meals programs, healthy body competitions by Rotary etc, market identifications and market development through such schemes as Satna project in Andhra Pradesh and Egg Cart Scheme in Madhya Pradesh.

9. Another suggestion is that the contract farming (integration) is to be introduced wherein the branded manufacturers of broiler birds and mutton (so far no branded mutton in India) supply the feed, chicks (for instance Vencob brand in southern India), goats and sheep, vaccines and medicines, sheds, water supply, etc., to farmers to rear chickens and beasts and then to sell the same to the manufacturers at pre-determined prices. This system can not only prevent the farmers' problem of investment, uncertainty in meat prices but also ensure regular income and regular supply of meat to meet the demand.

Synthesis

The findings stated above explicitly show that though the Indian meat market appears quite informal and unorganized, there is great need for

introducing the marketing concept which has been absent till now, into selling of the meat and meat products in India in order to face the imminent competition from foreign brands and enhance the chances of survival in the market.

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