

## **CONSUMERS' PREFERENCES TOWARDS POULTRY MEAT PRODUCTS IN ALBANIA**

Ms. Irimi Goga

PhD candidate, Faculty of Economy & Agribusiness,  
Agriculture University of Tirana, Albania.

### **ABSTRACT**

The consumer's philosophy regarding the eating culture is oriented and more and more focused on a healthy lifestyle. The consumers are more and more aware for the products they should consume. In such circumstances, meat products as very important component of a healthy diet, are taking a significant position in the market among all other products.

The goal of these study is to encourage the producers to improve their meat products. By the other side, the consumers would prefer to know what kind of meat they are buying. In this case, the producers should provide a product information regarding the origin of the products, conservation manners etc. All this information can be an added value for the product which can give a chance to the producers to define a better price for their products.

In order to identify the consumers' preferences for poultry products we use a questionnaire completed by different consumers from Tirana and Durres regions. There were completed around 250 questioners from different and casual interviewers. The survey information is constructed on socio-demographic data, such as age, sex, education, income. Meanwhile there were question regarding different attributes such as flavour, appearance of meat, smell, origin of poultry meat products. The sample on which the research was performed was consisted of individuals. The questionnaire objectives were to figure out and evaluate the preferences for meat and poultry, preferences for poultry meat types and products, find out the place where consumers purchase their poultry products. Through the survey is intended to identify some correlations between meat consumption and consumer's income level, and the attributes of the poultry meat.

This study, aimed to identify the consumers preferences for meat products, especially for poultry meat products based on the socio-demographic, age, incomes data analysis a. In the same time, this study may be an orientation for the poultry meat producers to be slanted towards by the consumers 'preferences well defined.

**Keywords:** Consumer's behaviour, Meat, Preferences, Poultry meat

## 1. INTRODUCTION

On a global level, poultry are valuable animals because of their contribution to protein sources, and to high contribution in the lifestyle of the consumers.

Based on the information on healthy nutrition and well-being, meat is a good source of protein, minerals (iron, zinc, calcium), and vitamins (A, B12 and other B vitamins) (*Pereira & Vicente, 2013; Randolph et al., 2007*). As part of a nutrition transition (*Popkin, Adair, & Ng, 2012*) and livestock revolution (*Delgado, 2003*), growth of meat consumption in developing countries is likely to increase.

Poultry, are categorized as domesticated birds kept either because of their products such as meat, feathers or eggs. They establish a diverse group of animals, which can be incorporated into many farming systems. Throughout the world, poultry is identified and estimated for the mutual benefit of animals and the humans involved. It is a great significance their ability to adapt many types of feed, such as residuals from agricultural activities, households and food processing industries. (al., December 2015)

According to Food & Agriculture Organization(2014), average annual consumption of meat in developed countries is 75.5 kg/inhabitant, while consumption of 33.9 kg/inhabitant is estimated in developing countries. Worldwide, levels of meat consumption are projected to increase by 72% in 2030 compared to the situation in 2000 (*Fiala, 2008*).

Based on Food and Agriculture Organization statistics, (FAO, April 2018, p. 3), world poultry meat output is estimated at 120.5 million in 2017, up 1.1 percent from 2016. Outputs expanded in almost all major poultry producing regions despite the outbreaks of the Highly Pathogenic Avian Influenza (HPAI) in Africa, Asia and Europe. Between 2010 and 2017, world poultry meat production has increased by 21.3 million tonnes, but over the years the rate of growth has been decelerating.

In the EU, output was constrained by HPAI outbreaks, limiting production growth to 0.8 percent as against 4 percent 3 years ago.

In many countries, HPAI outbreaks badly affected output, especially early in 2017, but recovered in the following months, leading to output stability. At the same time, the poultry sector suffer a contrast between dominant global large corporations and small-scale producers especially in the Global South (2011).

The last decade, the global poultry meat market has undergone an unpredicted and complex changes. The development of the poultry meat industry is steady growing and is one of the most competitive sector in the European market. In 2018, the production of the poultry meat in EU countries is increased with 4.2% (*EU Market Situation for Poultry Committee for the Common Organization of the Agricultural Markets 24 January 2019*). EU Policies in meat market intended to boost a safe, nutrition, fresh meat products towards the needs of consumers.

### **1.1 Agriculture Sector in Albania**

Meanwhile the agriculture sector in Albania as well is fronted with market changes and very competitive environment.

Although Albanian economy has figure out a stable growth. Based on the indicators of economy, the GDP in 2016 was increased with 3.31% compared with one year before. During year 2017, Albanian economy performed a real GDP growth rate by 3.82% compared with 2016, after a growth rate by 3.31% in 2016 compared with 2015.( Albanian Institute of Statistic's 2016-2017).

In a glance, the total Gross Domestic Products figure out that Trade, Accommodation, Construction and Food Services has an impact of 0.83% in GDP, the Administrative Services and Professional activities with 0.39%. and for sure, it is important the contribution of the Agriculture, Forestry, and Fishing sector which provides 0.33 % in the total Gross Domestic Products. (Albanian Institute of Statistic's, 2019)

The total Albania land area of 28,750 km is divided on: 24% is agricultural, 36% forest, and 15% pasture or other type of land.

The development of Albania, in the latest years, is based on a vital economic growth.

The agriculture sector plays a significant role in the Gross Domestic Products growth which slightly but steadily is increased.

The government aims to boost agricultural production by providing financial support to farmers and facilitating private investment in the agro-processing sector.

Meat production sector is one of the latest sector which is developing significantly in the market

Albania as a Mediterranean country with a suitable climate and geography characteristic is more adapted for livestock production. In 2012, the livestock sector accounted for 44 % of the total production value and crop production for 56 % (Albanian Institute of Statistic's 2018) . The Albanians 'incomes are based mostly in the trade, services, and agriculture industries.

Being an important source of employment for the economy is a dynamic reason to rank the agriculture sector as one of the most important sector of economy. A considerable number of the population is living in rural area and are employed in agriculture. During 2017, the Service sector and the Agriculture sector have the biggest number of employees, respectively with 42.4% and 38.2 % of the total employment rate.

Meat sector producer faced difficulties in a competitive market and they should find innovative technology in order to offer good quality of meat products. Albanian Agriculture statistics figure out the livestock production is 44% of the total agriculture output. In 2016, the number of cattle, sheep, goats and poultry have increase (table below). Meanwhile, in 2017, the number of livestock have slightly decrease compared with 2016. So, cattle from 492 head in 2016 decrease in 475 heads in 2017; sheep from 1972 heads drop down to 1926, poultry also has a decrease: from 8326 heads in 2016 drop down to 7835 heads.

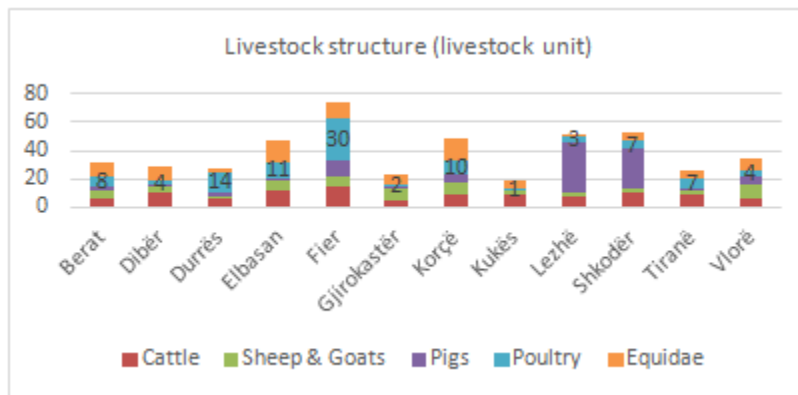
Although, the livestock production is 161 000 tones, and is increased with 0.9% (Albanian Institute of Statistic's, 2018)

Based on the Albanian Institute of Statistic's (*INSTAT*) data 2018, in the table 1 and figure 1 is presented the contribution of livestock structure in main cities in Albania.

**Table 1: Number of Livestock, 000 heads**

Description	2012	2013	2014	2015	2016	2017
<b>Cattle</b>	<b>498</b>	<b>498</b>	<b>500</b>	<b>504</b>	<b>492</b>	<b>475</b>
cows	358	356	358	357	355	349
<b>Sheep/Goats</b>	<b>2,619</b>	<b>2,723</b>	<b>2,804</b>	<b>2,850</b>	<b>2,911</b>	<b>2,859</b>
<b>sheep</b>	<b>1,809</b>	<b>1,856</b>	<b>1,896</b>	<b>1,918</b>	<b>1,972</b>	<b>1,926</b>
Milked sheep	1,390	1,413	1,419	1,417	1,428	1,407
<b>goats</b>	<b>810</b>	<b>867</b>	<b>904</b>	<b>932</b>	<b>941</b>	<b>933</b>
Milked goats	614	656	695	700	716	717
<b>Pigs</b>	<b>159</b>	<b>152</b>	<b>172</b>	<b>171</b>	<b>181</b>	<b>180</b>
Sow	12	12	12	11	13	12
<b>Equidae</b>	<b>97</b>	<b>93</b>	<b>91</b>	<b>91</b>	<b>94</b>	<b>89</b>
Horses	34	35	32	31	32	32
<b>Poultry</b>	<b>9,494</b>	<b>8,928</b>	<b>9,493</b>	<b>8,558</b>	<b>8,326</b>	<b>7,835</b>
<b>Beehives</b>	<b>239</b>	<b>246</b>	<b>261</b>	<b>271</b>	<b>303</b>	<b>290</b>

Source of information: Ministry of Agriculture and Rural Development



**Fig. 1: Livestock structure in main cities in Albania**

During period 2014-2017 it is noticed a positive trend the agriculture production. The increase of agriculture production has a significant impact in the Albanian economy development, reducing unemployment rate, decreasing the products prices and influence in the import rate.

The farms in Albania are still facing several problems. Most of the Albanian farms are at subsistence level and mainly the farms' production are dedicated to fulfill the family needs.

The size of the farms is very small varied to 1.20 ha. The idea to gather and collaborate with each –other for the farmers is still unacceptable. Only few farmer took the initiative to co-operate with each - other. Having the courage to join other farmers in collective action can promote the adoption of new, more productive, technologies in order to cultivate larger areas.

Based on the figures of Ministry of Agriculture, Consumer Food Protection (MACFP, 2011), 24% of the land area are agricultural land and 54% is covered pasture forests, etc, the rest is used for other purposes The size of the agricultural area per inhabitant in Albania is low (only 0.370 ha/inhabitant)(FAOSTAT). The rural households owned the majority of agriculture land (80 %) and the state owned the rest (134 000 ha) (MAFCP 2011)

The average of the farmer's age is getting older every year due to emigration or migration. So, the number of young farmers above 25 years old has decreased and 33% of the farmers are 65 years old and more. (MBZHRAU, 2012).

Only 1/3 of the rural population has the respective education on agriculture field. Most of the young people of the rural area don't follow the studies due to several conditions. Only 3% of the farmers has the college education. So 37% have followed the high school education.

The implementation of legislation and agriculture policies should be improve in order to reach European standards of production. Environment standards, animal welfare, and food safety are important indicators which needs to be improved.

The financial institutions in Albania, doesn't support as much as they could the agriculture sector. The agriculture loans are only 5% of the total loan portfolio.

So, all this factor and a lack of the structure market and distribution of the products are the obstacles of this sector that should be resolve as soon as possible.

## **2. POULTRY MEAT CONSUMERS PREFERENCES**

This approach, is going to present a data analysis on consumer preferences for poultry meat based on socio – demographic indicators and on the meat product attributes.

Due to the important position on a competitive market, the poultry meat producers have to be oriented on the demand of the consumers based on their socio demographic indicators and towards the consumers 'attributes orientation.

In order to meet the consumer demand and the producers is needed to adapt innovative technology, processes and products.

Nowadays, living healthy is the focus of the consumers. Poultry meat is a quality source of the protein on the consumer's diet. Their interest on the origin, freshness, taste are the cues for the poultry meat producers.

Based on different studies, the consumers' attitudes are influenced by extrinsic cues as well by intrinsic cues for quality selection.

Nevertheless, consumers' choices are influenced by many factors that ultimately shape purchasing decisions. Font- i- Furnols and Guerrero (2014) identified consumers' behavior as depending on interrelated factors that included psychological influences (willingness, risk, expectations, sociocultural factors, lifestyle, and values), sensory qualities (visual appearance, texture, flavor, and odor), and marketing factors (price, label, brand, and availability).

Also, Grunert, Bredahl, and Brunsø (2004) used the Total Food Quality model to analyze consumers' perception and decision- making in determining meat quality. The model showed that consumers form expectations about quality at the point of purchase, based on their own experience and informational cues available in the shopping environment. These preferences are influenced not only by quality and consumer- related factors but also by context, culture, and information (Kanerva, 2013; York & Gossards, 2004).

Alemu, Olsen, Vedel, Pambo, and Owino (2017) showed that preferences in Kenya are also influenced by context and information in addition to product attributes.

In many studies is shown that “country of origin” and “place of purchase” are main key indicators. The experience quality indicators like flavor or smell, are hard to measure but they play an important role on the assessment of the quality of fresh meat.

In response to assess the safety of meat, “country of origin” may be consider as an extrinsic attribute cue. As well, place of purchase, color, portion of the meat and, fresh or frozen meat credence quality attribute cue are also very important.

In order to asses eating quality as well to indicate safety of meat products, consumers often refers to the “Country of origin” attribute. This holds for all four types of meat: beef and veal, pig meat, poultry meat, and goat meat.

Althought, others meat attributes, which have been taking account by buyers preferences such as price, incomes, migration of the population, age, education etc are not less important.

The impact of the lower price of poultry meat than other types of meat, is a factor which may conduct the consumer to prefer the poultry meat consumption. (*FENAVI, 2007; Galvis, 2000; Lanfranco & Rava, 2014*).

The change of the lifestyle orientation based on healthy diet has also impacted on the increase of the buyers ‘demand for meat products, especially for poultry meat products as they are a big source of proteins. They pay attention on the selection of safety and fresh products.

Culturally, meat is associated with wealth and consumption is viewed as a reflection of favorable economic conditions (Nestle, 1999). Some diseases have influence in the production of the red meat.

This phenomenon, has reflected in a more efficient production of other protein products such as poultry and fish. (Fernandez-Armesto, 2001).

### **3. METHODOLOGY**

In order to be able to conduct this study, it was constructed and conducted a survey which will figure out the socio – demography and economic data situation of the interviewers, their desire to consume the meat products especially poultry meat, how much they want to spend for meat, how often they buy meat products.



The selection of the poultry meat attributes was made based on what other studies investigated and what different author has said regarding the products attributes.

This survey was conducted in the Tirana and Durres area, with around 250 interviewers.

A conjoint choice method which is very often used in the marketing researches will be used to analyze the results of the surveys. Within this method, is easy to understand experience of the consumer and in the meantime to provide a reliable information for the consumer but mostly to provide useful information which should oriented the producers towards the buyers' demands and socio – demographic situation of the consumer.

In this regard, as poultry meat attributes we can mention: country of origin, price, age, gender, color, place of purchase, fresh or frozen. An analysis socio demographic of meat consumers in Tirana-Durres area.

Combination of these indicators will give the necessary information helped to identify buyer's behavior towards the attributes of the poultry meat.

The perception of products, including perception of its attributes means the starting point for the consumer decision.

#### **4. RESULTS AND DISCUSSION**

Our survey is based on the different factors: cultural, social, individuals and psychological, which attempt to understand a market with different characteristics and desire of the different consumers.

A combination of the attributes of poultry meat will conduct us in an analysis of buyers' preferences for poultry meat.

Based on our survey, 39.6% of the interviewers are male and 60.4% are female. Meanwhile, the average age of the interviewer is 35 years old. The minimum is 23 age and the maximum is 62 age. The interviewers 'family has an average of 3-4 members.

From 250 interviewers, 2% of them has college education, 76.4% has high school education, and 21.6 % has master degree.

Our data analysis figure out that the children have a significant influence on the decision for choosing poultry meat products.

The indicator of Spearman's,  $R \rho = 0.768 > 0.6$ , (table 2), helped us to understand that there is a positive and a strong relation between children and preferences for poultry meat.



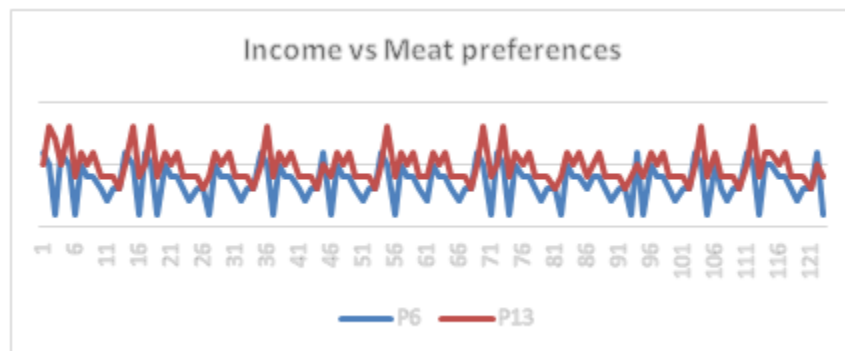
**Table 2: Spearman’srho indicator**

Correlations				
			No. children in family	How impact have the children in buying decision
Spearm an's rho	No. Children in Family	Correlation Coefficient	1,000	,768**
		Sig. (2-tailed)	.	,000
		N	248	248
**. Correlation is significant at the 0.01 level (2-tailed).				

Source: Own data analysis

In this regard, the producers should take in consideration also the children as one of their important consumers.

The income is an important indicator that influence the buyer decision which was analyzed in our survey too. Our data analysis lead us on the deduction that buyers’ decisions are influenced by their incomes. There is a straight correlation between two indicators: when the incomes increased as well increased the consumption of meat products. This is shown as well in the figure 2 below.



**Fig. 2: Incomes vs Meat Preferences**

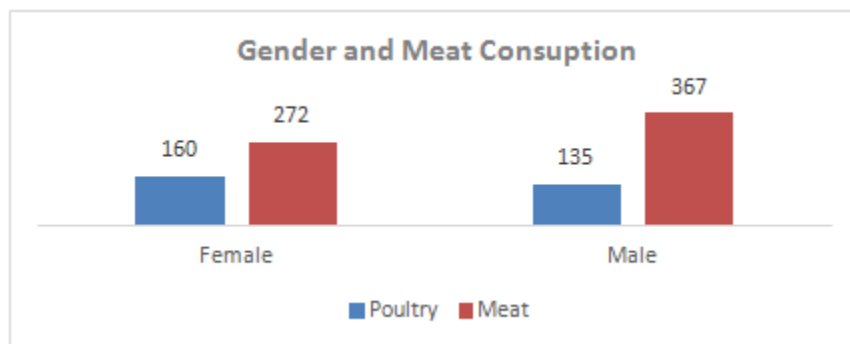
The healthy lifestyle now a days is a trend of both female and male consumers. Gender is an important indicator which has a low impact on buyer decision. Here, we can say that in Albannia, despite the fact who goes to market, the woman is the one which indicates the preferences of the family. (In most of cases).

In fact, women are more influenced by health and ethical motives than the men and they are also more willing to reduce meat consumption (Tobler, Visschers, & Siegrist, 2011).

As well, the table below figure out that both female and men consume meat products in their diet. Regarding, the consumption of products, in the Albanian family the woman is still the decision makers. Despite on this we can observed that the trend of the meat consumption especially for poultry meat is almost the same. Our analyses indicate that female consume 37% poultry meat of their total meat consumption. By the other side, male consume 26.9% poultry meat by the total meat consumption showing in the figure 3.

**Table 3: Attributes of the poultry meat products (average)**

Freshness	Flavor	Certification	Origin	Appearance	Brand	% Fat	Package	Offers (lower prices)
4.9	4.89	4.4	4.37	4.36	4	3.2	3.2	2.8



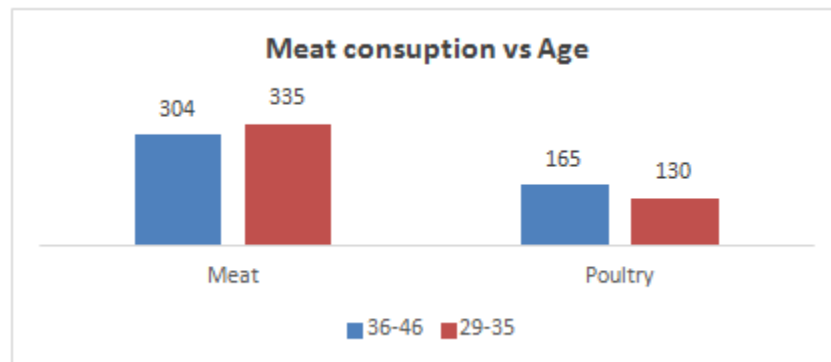
**Fig. 3: Gender & Meat Consumption**

The analyses of our survey show up a relation between age and meat consumption.

So, the table below, figure out that the group age 36 – 46 consume less meat than the group age 29-34. We can observe that the meat product is in important product for both group ages.

Meanwhile, we can see that group age 36-46 consume 27% poultry meat products and the group age 29-35 consume less of the poultry meat product, respectively 35% of the total meat consumption.

It is obvious that meat consumption is slightly declines with the age presented in the figure 4.

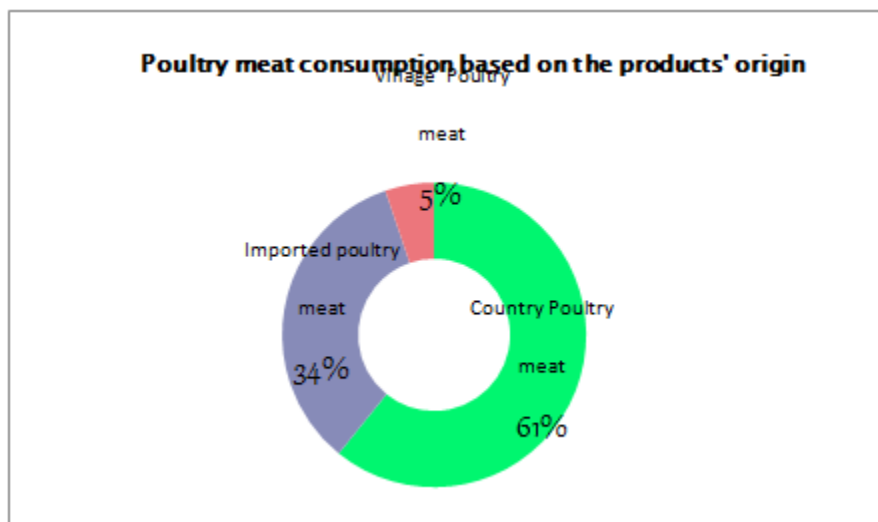


**Fig. 4: Meat Consumption vs Age**

Based on the above data analysis we can say that the attributes of meat consumption especially poultry meat consumption are very important indicators to distinguish the market segmentation for poultry meat, as a key of marketing strategy which will lead to an efficient meat market.

In this regard, producers should evaluate the incomes of their consumers, higher buyers' incomes means higher consumption of poultry meat products.

Regarding the origin of the poultry products, the graph below show up that 60.8% consume country poultry products, 34% of the interviewers consume imported poultry products, and only 5.2% of the interviewers consume poultry products from village (figure 5).



**Fig. 5: Poultry meat Consumption based the origin of product**

Meat is a products that is always used almost from all Albanian family. This is a tradition of our country, especially in North and South of Albania which is indicated maybe by climate characteristics and geographical position of Albania.

Based on our survey data, it is show up that the average consume of meat products is 7.87 kg with a std deviation of 8.7. This deviation means that there are 2 kind of consummator: those who consume a considerable quantity of meat and those who consume a small quantity of meat.

Now a days, both female and male are aware of the healthy products and they both take care to have a healthy lifestyle.

This is reflected also in our study. The results from our data analysis show up that there is a weak correlation of the poultry meat consumption between female and male.

The major poultry meat quality attributes are appearance, texture, juiciness, flavour, and functionality. Of these, the most important have traditionally been appearance and texture since they most influence consumers' initial selection and ultimate satisfaction with traditional poultry meat products. Although juiciness and flavour are extremely important, except for isolated defects they are most often more a function of preparation than of the product itself.

The different attributes of poultry meat impacts the consumer decision for this product.

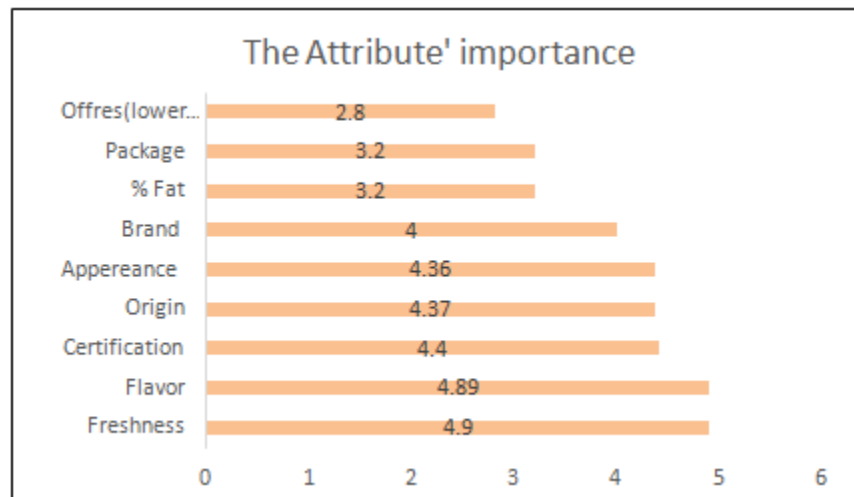
The different attributes of the poultry meat are very important on consumer buying decision.

The table below figure out that the consumers are critic and asses a lot almost all the meat attributes, as they are related to their health.

As one of the most important of the attributes is indicated "the freshness" with an average of 4.9 and Flavor with an average of 4.89 (points from 1 the lowest to 5 the highest).

Next, the consumer asses important the "Certification" (4,4), origin, appearance with an average of 4.37and brand 4.0.

Less importance has the lowest price in the market which is related to the consumer trust related the freshness of the product figure 6.



**Fig. 6: The attribute' Importance**

## 5. CONCLUSION

The results of this study attempt to be a good orientation for the poultry meat producers to fulfill and lead the buyer's demands.

In general, different needs, characteristics, behaviors of the consumers towards different attributes of the product and the market segmentation should be the basic orientation of the producers in order to meet the consumer's expectation.

Our analysis figure out the relation of group ages and consumption of meat products, is an indicator to distinguish the market segmentation for poultry meat based on consumers 'age.

Based on our research, it is investigated that older age consume less poultry meat.

The female consumers are more oriented on a healthy diet and on calories than the male. Men, are mostly oriented to taste all kind of foods. Even on our study, it is show that women consume higher poultry meat products than men.

The two most important quality attributes for poultry meat are appearance and texture. Appearance is critical for both the consumers' initial selection of the product as well as for final product satisfaction.

Texture is the single most important sensory property affecting final quality assessment. Appearance quality attributes include skin color, meat color, cooked meat pinkness, and appearance defects such as bruises and hemorrhages.

Since appearance is so critical for consumer selection, poultry producers go to great lengths to produce products with the appropriate color for a particular market and to avoid appearance defects which will negatively affect product selection or price.

Although other quality issues such as juiciness and flavor are important, they are more a function of product preparation and infrequent, but acute, production or processing errors which are usually easily corrected or avoided.

An understanding of the major issues contributing to poultry color and meat tenderness is critical to producing uniform quality products. (Poultry meat quality: D.L. Fletcher; *World's Poultry Science Journal*, Vol. 58, June 2002).

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