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Evaluating market prospects for Prekmurje dry ham in relation to consumption characteristics of dry meat products in Slovenia

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SUMMARY – Prekmurje dry ham, or "Prekmurska šunka" in Slovenian, is a traditional dry ham of the north-eastern part of Slovenia. It is slightly smoked, can be dry or wet salted, with a typical pear-like form (prior to the curing process, the ham is de-boned, but left covered with subcutaneous fat and skin on the side). Prekmurje dry ham is protected by a geographical designation. Presently, it can only be found on the local market. Some producers wish to increase the production and enlarge their market. Therefore a study was set up to evaluate market opportunities of Prekmurje dry ham in view of consumption characteristics and perception of traditional dry-cured meat products as expressed by Slovenian consumers. Within the study, two focus group discussions with eight consumers per group and a telephone survey on 504 consumers were performed. The results obtained are presented; (i) consumers' perception of factors important for consumption and purchase of dry meat products; (ii) consumption characteristics of dry meat products; and (iii) consumers' perception of traditional dry meat products and particularly of Prekmurje dry ham. According to the results, dry-cured ham of Prekmurje has the extrinsic indicators which correspond to the image of value added product (origin, region, tradition). However, considering the whole Slovenian territory, telephone surveys demonstrated poor image of Prekmurje dry ham compared to other traditional products. Besides, in a blind sensory test of three dry hams which was made during focus group discussions, Prekmurje dry ham was the least appreciated among the participants. These results can be considered as unfavorable for a product which has yet to convince the consumers. Moreover, it seems that the poor image could be related to the lack of knowledge about the product which indicates a strong need for promotional activities, if producers wish to go beyond the regional market.

Keywords: Consumer, dry-ham, geographical designation, marketing.

RESUME – "Evaluation des perspectives de marché pour le jambon sec Prekmurje en liaison avec les caractéristiques de consommation des produits carnés secs en Slovénie". Le jambon de Prekmurje, appelé "Prekmurska šunka" en langue slovène, est un jambon sec traditionnel, provenant de la région nord-est de la Slovénie. Ce produit, salé à sec ou saumuré et légèrement fumé, a une forme de poire (avant la transformation, le jambon est désossé, mais laissé couvert par la peau et le gras sous-cutané). Le jambon de Prekmurje est protégé par une dénomination géographique. Actuellement, on ne peut le trouver que sur le marché local. Une étude a été menée pour évaluer les possibilités de marché pour le jambon sec de Prekmurje en considérant les caractéristiques de consommation et la perception des produits carnés secs traditionnels par les consommateurs slovènes. Dans l'étude, des enquêtes qualitatives (deux discussions de groupe de huit consommateurs) et quantitative (enquête téléphonique sur 504 consommateurs) ont été réalisées. Les résultats suivants sont présentés : (i) la perception par les consommateurs des facteurs importants pour la consommation et l'achat des produits carnés secs ; (ii) les caractéristiques de consommation des produits carnés secs ; et (iii) la perception par les consommateurs des produits carnés secs traditionnels et en particulier du jambon sec de Prekmurje. Selon les résultats, le jambon de Prekmurje a les indicateurs extrinsèques qui correspondent à l'image d'un produit à valeur ajoutée (origine, région, tradition). Cependant, si l'on considère l'ensemble du territoire slovène, l'enquête téléphonique auprès des consommateurs slovènes a révélé une image médiocre du jambon de Prekmurje comparé à d'autres produits traditionnels. En outre, dans un essai sensoriel en aveugle de trois jambons secs réalisé pendant les enquêtes qualitatives, le jambon de Prekmurje était le moins apprécié. Ces résultats peuvent être considérés comme défavorables pour un produit qui doit encore convaincre les consommateurs. D'ailleurs, il semble que la médiocrité de son image pourrait être liée au manque de connaissance du Jambon de Prekmurje par les consommateurs, ce qui indique un fort besoin de promotion, si les producteurs souhaitent dépasser le marché régional.

Mots-clés : Consommateur, jambon sec, dénomination géographique, vente.

Introduction

Slovenia has a strong tradition of dry-cured meat production. Several meat products are in the process of protection according to EU legislation, one of them is Prekmurje dry ham ("Prekmurska šunka"). This dry ham is typical for Prekmurje, a north eastern region of Slovenia. It is slightly smoked,

can be dry or wet salted, with a typical pear-like form. Prior to the curing process, the ham is deboned, but left covered with subcutaneous fat and skin on the lateral side. The process of drying depends on the weight of the fresh ham and must be at least six months long. The actual yearly production is estimated to be around 10 tones of dry ham; half of that production is supplied by two local butchers, 41% of hams is produced and sold by local tourism. The production is not increasing due to the limited demand. Some of the producers would like to increase the production and gain from the marketing advantage offered by the protection of geographical designation, so a study was set to evaluate the market potential for Prekmurje dry ham.

Material and methods

Qualitative research – focus groups discussions

Consumers' attitude regarding traditional dry-cured meat products was assessed with two focus groups discussions, one in the region where Prekmurje dry ham is produced (the town Murska Sobota) and another in the capital of Slovenia (Ljubljana). Each group consisted of eight consumers (aged from 25 to 50 years, having variable level of education), responsible for the purchase, and in which at least two dry-cured meat products are consumed monthly. Special attention was given to the occasions at which different dry cured meat products are consumed, reasons for purchase and factors affecting their choice. During the discussion, a blind sensory test of three different dry hams was made, one of them being the Prekmurje ham.

Quantitative research – telephone surveys

It was made by computer-assisted telephone interviewing, made with the households in which dry-cured meat products are consumed at least occasionally. Out of 639 households called, 78.9% (n=504) positively responded that at least occasionally, dry-cured meat products are consumed in their household. Each interview lasted about 15 minutes. The respondent was a person responsible for the purchase in household. The final sample comprised 504 respondents of different sex, age, education, household income from different regions, urban and non-urban areas.

Results and discussion

Focus groups' discussions revealed that dry meat products are often perceived as special, better taste products meant for special occasions; we were also able to recognize the distinction between prestigious (i.e. dry ham) and common dry-cured meat products (i.e. dry sausage). In a telephone survey, a majority (82.3%) of consumers confirmed that their consumption of dry meat products increases for festive occasions. Among these, a half of the respondents declared that they consume dry meat products mainly on festive occasions. Results in Fig.1 show, that dry salami is the most and dry stomach the least frequently eaten product. The noteworthy position (86% of respondents eat it regularly or occasionally) can be seen for Karst dry ham, which is the most expensive dry meat product.

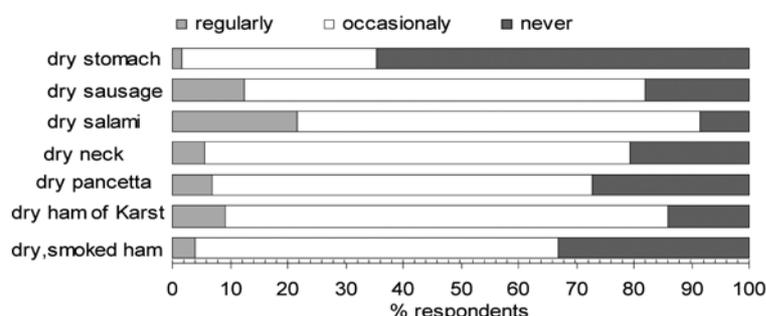


Fig. 1. Consumption frequency of dry meat products as declared by Slovenian consumers (n=504).

Estimation of yearly consumption of dry cured meat products (Fig. 2) shows that more than a half of households consume above 10 kg (above 200 g per week) of dry-cured meat products which could be considered as regular eaters of dry meat products.

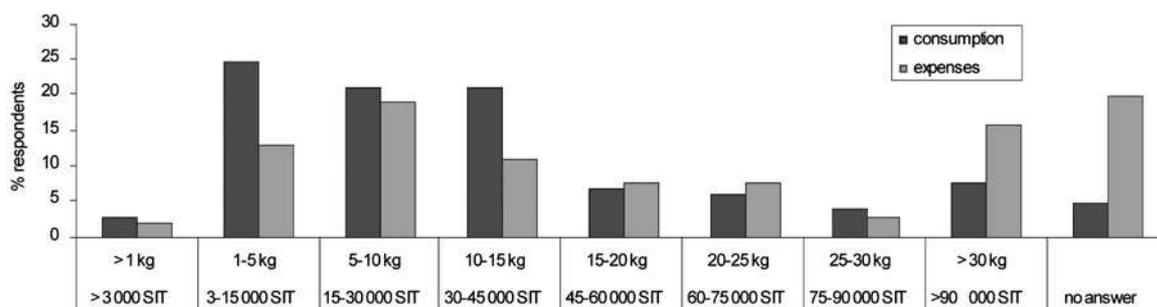


Fig. 2. Yearly consumption of dry meat products (quantity, expenses) as declared by Slovenian consumers (n=504).

During focus group discussions the participants listed many factors affecting the purchase decision. Although the origin didn't come spontaneously to their mind, their reaction to the question was very strong. Moreover, they expressed strong belief in importance of the region (climate) for the quality of the product. The relative importance of the principal factors affecting the choice of dry meat products was tested in the telephone survey (Fig. 3). In average, the highest importance was ascribed to the region or producer, followed by the appearance of the product. It is worth mentioning that in average (at least on a declarative basis) the price was not ranked among the most important factors. Consumers' "belief in region" is very important as the expectations regarding the regional product largely originate in general image of the region (van Ittersum, 2001).

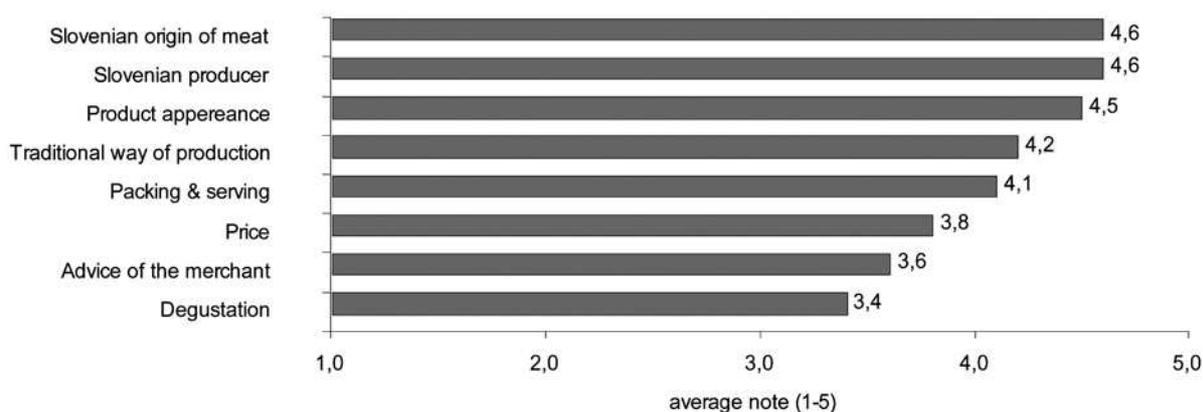


Fig. 3. Importance of factors (average note on 1-5 scale) affecting purchase decision of dry meat products (n=504).

The great majority of respondents buy dry meat products in big and/or self-service markets (Fig.4); moreover big markets and other self-service shops represent the principal purchase location for dry meat products. Classical butcheries (meat specialized stores) seem to preserve a notable market share, but for only 6.9% of respondents that's a principal purchase location. Provision with home made dry meat products (21.8% of respondents) or buying products "on farm" (14.3% respondents) confirms the confidence for such products, which was demonstrated during discussions. However these products represent the principal source for only 3% and 2% of respondents, respectively. It is not a lot, considering that 49.5% of Slovenian population lives in non-urban area and about 12% of Slovenian households are family farms (Statistical office of the Republic of Slovenia, 2004).

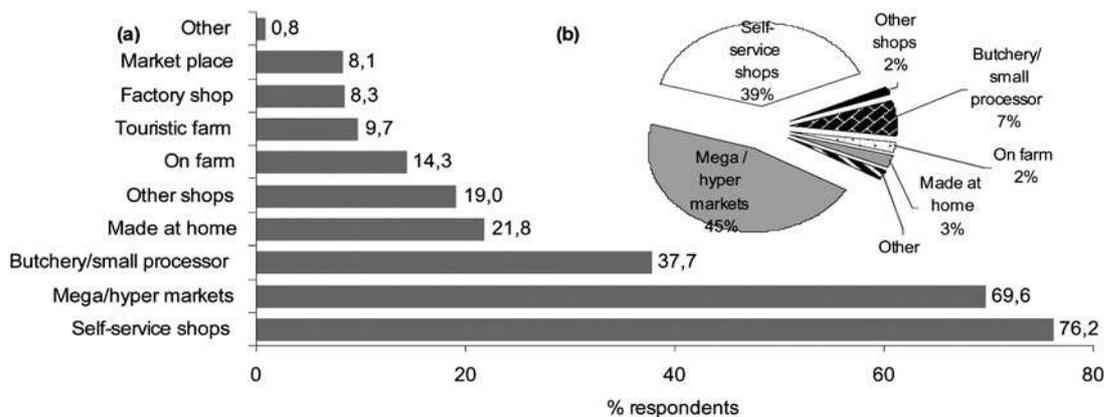


Fig. 4. Importance of purchase locations (a) and principal purchase location (b) for dry meat products (n=504).

During discussions extremely positive reaction to "traditional Slovenian food" was demonstrated, so we expected a positive attitude towards traditional dry meat products also in the telephone interviews.

We tested the acquaintance of consumers with traditional products (Fig. 5) and the image of these products (Fig. 6). Among the reviewed consumers, only those who stated that they have at least heard of a product were asked to confirm (or not) certain statements. Results show that Karst dry ham is the most and "Šebreljski" stomach the least recognized product (results for the latest regarding the image are not shown). Karst dry ham has a special place (image) among Slovenian consumers. The differences between other products are small. Nevertheless the lowest opinion in several statements was given to Prekmurje ham (tastiness, naturally produced, for invited guests, for people enjoying good food, something special). According to Giraud (2002) the preference for regional product is based on a regional image rather than on familiarity with a product, so it would seem that the image of region Prekmurje was poor. But just the opposite was observed during the focus group discussion in which consumers expressed very positive feelings (good food, singing dialect, good people, clean and natural environment, plenty of sunshine and wind). Is poor image only due to consumers' limited knowledge of product? Probably, as only small share (<25%) of respondents (not shown) made a "correct comparison" when asked to which product Prekmurje ham resembles the most.

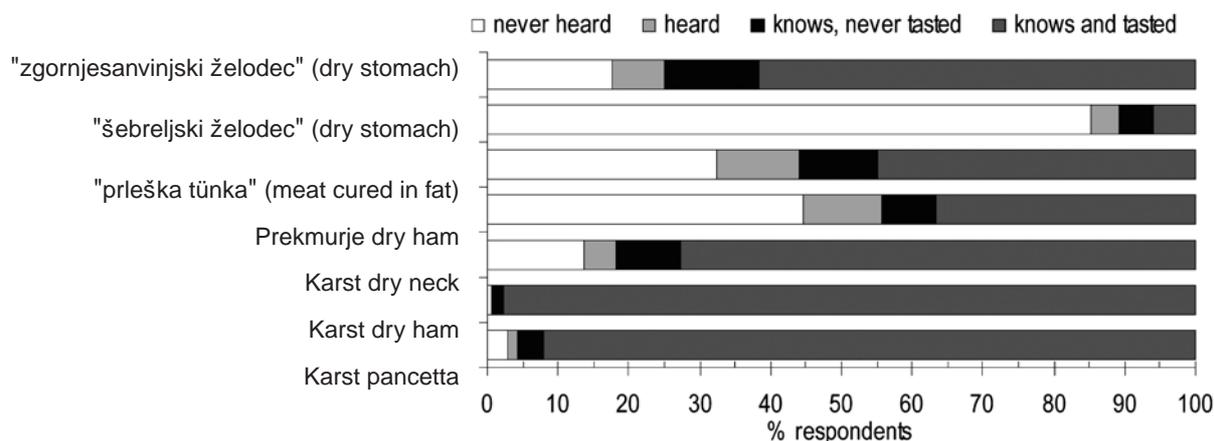


Fig. 5. Acquaintance of Slovenian consumers with some traditional dry meat products (n=504).

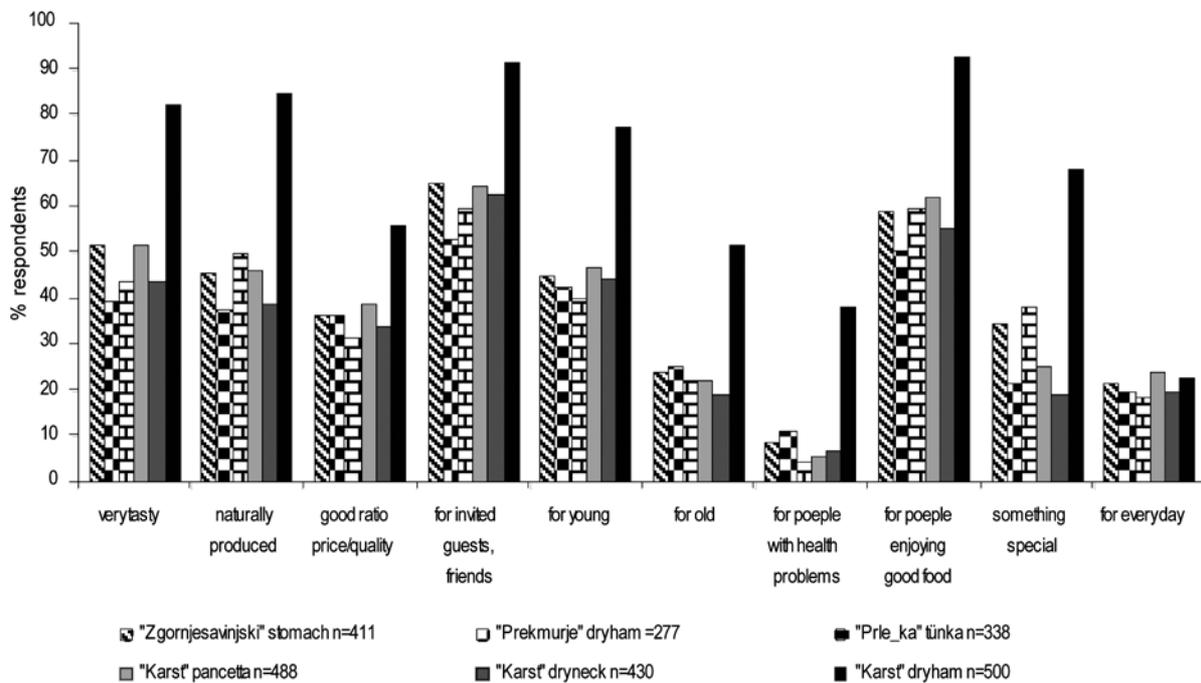


Fig. 6. The image of traditional meat products among Slovenian consumers.

During the discussions we performed a blind sensory test of three different dry hams (results not shown) i.e. comparing Prekmurje ham with two concurrent hams, which revealed that dry ham of Prekmurje satisfied consumers of both groups the least. Although this test was made with small number of consumers, we think that the result may be considered as disadvantageous, as this product has yet to convince the consumers. The repurchase of the regional product depends on consumers' favorable attitude meaning that the product must respond to consumers' expectations (Ittersum, 2001).

Conclusion

Focus groups interviews and telephone surveys demonstrated that origin, region, producer and tradition are important for Slovenian consumers, indicating that dry-cured ham of Prekmurje has the extrinsic indicators which correspond to the image of value added product. Moreover, very positive feelings towards Prekmurje region were expressed in focus group of the capital. Discussions also demonstrated consumers' confidence for the products made and sold "on farm", which could be used as a key point in sale through local tourism and for the promotion of Prekmurje ham. To be successful on a larger market, a product should be sold in principal purchase locations (in case of Slovenia in big and self-service markets) but this would demand from producers to supply sufficient quantity and standard quality, which is presently a problem in case of Prekmurje dry ham. On the other hand telephone surveys demonstrated a poor image of Prekmurje ham and a blind sensory test of revealed that Prekmurje ham satisfied consumers the least. To our opinion, these are unfavorable results for a product which has yet to convince the consumers. Low impression is probably due to the lack of knowledge of Prekmurje ham which indicates a strong need for promotional activities, if the producers wish to go beyond the regional market.

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