

# ANALYSIS OF CONSUMER BEHAVIOUR IN THE EUROPEAN POULTRY MEAT MARKET

Vida Viktória, Szakály Zoltán

University of Debrecen, Faculty of Economics and Business

4032 Debrecen, Böszörményi str. 138, Hungary

[vida.viktoria@econ.unideb.hu](mailto:vida.viktoria@econ.unideb.hu)

[szakaly.zoltan@econ.unideb.hu](mailto:szakaly.zoltan@econ.unideb.hu)

## ABSTRACT

This research has also confirmed that poultry meat is currently in its golden age, not only in our country but also globally. The beneficial physiological effects of poultry meat, its nutritional value (high protein content), and its role in modern nutrition and diets have made it the most popular and 'fashionable' meat product of our time. Healthiness as a megatrend has favoured the consumption of poultry meat, which has been consumed for decades, and is reflected in the growth in production, trade and consumption. The trend of environmental awareness has also pushed the meat market towards the consumption of poultry meat as it is one of the least environmentally intensive compared to other meat types. Poultry meat is the second most commonly consumed meat in the EU, but in some European countries, it has taken over the overall lead (e.g. Hungary, Cyprus, and the UK). Poultry is not only preferred for its healthiness and low environmental impact, it is also an easy, versatile, quick-to-prepare, cheap source of protein. These advantages are expected to lead to further growth in the future in terms of production, trade and consumption, China, the US, the EU and Brazil dominate the poultry sector.

**KEYWORDS:** poultry meat, consumption, trends, consumer behaviour

**JEL code:** Q13

## 1. INTRODUCTION

Population growth creates an ever-increasing demand for food consumption (UN, 2021; FAO, 2022), together with an increase in average per capita incomes; will result in higher pressure on natural resources and biodiversity (Foley et al., 2011). Meat consumption in Europe will still increase slightly in the next decade (Statista, 2020; EC, 2021), but only the type of meat preferred by consumers will change (EC, 2022<sub>A</sub>).

The only type of meat where average consumption is expected to increase is poultry (OECD – FAO, 2022), which mainly affects the chicken, but also the turkey sector. Concerns about health, animal welfare and environmental protection also shift consumption towards poultry meat (Statista, 2020; EC, 2022<sub>A</sub>). Among the new trends, we find the possibility of plant-based nutrition, as a result of which the number of flexitarians, vegetarians and vegans is increasing (EC, 2018; Statista, 2020). This may be the most limiting factor for poultry meat.

Another increasingly strong consumer trend nowadays is producing meat with animal welfare in mind. Eating organic food has become 'trendy', especially among younger generations, as part of their lifestyle that focuses on health and wellness/wellbeing (Kiss et al., 2015; Statista, 2020). Poultry accounts for the majority of the European Union's organic livestock, with around 60 million animals (FIBL - IFOAM, 2022), and the frequency of consumption of organically produced chicken was highest in the USA (27.7%) and EU (24.4%) in 2018, (Statista, 2019). In addition, consumers attach more and more importance to the origin of meat, and the way it is kept in accordance with animal welfare standards, they prefer quality consumption over quantity, and they are moving from consuming fresh meat to processed meat products (EC, 2018).

The importance of the poultry sector in modern times is unquestionable since poultry products have become a basic food product (Huszka, 2017; Vincze and Lendvai, 2012) not only in Europe but in many countries of the world. The reason for this is that many components of these meats have a positive effect

on our body from a nutritional and physiological point of view (Huszka, 2017), and compare with other types of meat, poultry is considered a cheaper type of meat.

## 2. MATERIALS AND METHODS

For this publication, we used qualitative methods such as document analysis, which is a research method that allows us to analyse a material, a written text, by taking into account its entire content and drawing conclusions from it. We also reviewed international statistical databases on the subject (OECD-FAO, United States Department of Agriculture - USDA, European Commission, Statista, Faostat), as well as national statistical websites, reports, and other documents (e.g. publications, studies, reports, etc.). By analysing the used statistical sources, documents, results, reports and experiences, we formulated the causal links, then concluded and finally made recommendations for the stakeholders in the sector. Many sectoral analyses and studies have been conducted using similar methodologies (Tikász et al., 2008; Szakály et al., 2009; Szigeti et al., Nábrádi et al., 2011; 2014; Kiss et al., 2016; Vida and Szűcs, 2020). The aim of the current research is to provide an overview of the situation of poultry meat consumption in Hungary and Europe, its consumption patterns and trends.

## 3. RESULTS AND DISCUSSION

The global poultry/chicken market has expanded rapidly, particularly over the last 30 years, due to significant modernisation and automation, as well as higher genetic productivity. In addition, the per capita consumption of chicken has increased due to these trends (Research & Markets, 2023).

The global poultry market was worth \$352 billion in 2022, and it grew to \$378.84 billion in 2023, in 2027 is expected to grow to \$487.39 billion. In 2022, it was the second largest segment within the meat, poultry and seafood market accounting for 23.3%. Asia-Pacific was the largest region in the poultry market in 2022 and Western Europe was the second-largest region (The Business Research Company, 2023).

To describe the poultry sector, first, we need to look at world production, trade and consumption data to identify the main countries (*Table 1.*). The production of poultry meat is almost 139 million tons in the world. According to the FAO, 2022 statistics, the leading poultry meat producers countries in 2022 were China (24.2 million tons), the US (23.3 million tons), Brazil (15.6 million tons) and the EU (13.3 million tons). These countries give the 55% of the world's poultry production. Total world imports of poultry meat amount to 14.8 million tonnes. The largest importers are China (1.8 million tons), Japan (1.3 million tons), Mexico (1.1 million tons) and the UK (0.9 million tons), they cover one-third of total imports. Exports are slightly more than imports, at 16 million tonnes worldwide. The main exporting countries are Brazil (4.9 million tons), the US (3.9 million tons), the EU (2.2 million tons) and Thailand (1.2 million tons). These four countries account for more than 76% of world exports. Consumption is highest in China (25.3 million tons), in the US (19.3 million tons), in the EU (11.7 million tons) and in Brazil (10.7 million tons). We can conclude from the data that China, the US, the EU and Brazil dominate the poultry sector.

Table 1. Leading countries in poultry production, consumption and trade 2022

	<b>Production – thousand tons</b>	<b>Consumption – thousand tons</b>	<b>Export – thousand tons</b>	<b>Import – thousand tons</b>
<b>1</b>	China – 24 200	China – 25 300	Brazil – 4 900	China – 1 800
<b>2</b>	US - 23 300	US – 19 300	US – 3 900	Japan – 1 300
<b>3</b>	Brazil - 15 600	EU – 11 700	EU– 2 200	Mexico – 1 100

Source: Authors' own compilation based on FAO, 2022 data

Within the EU, the main poultry meat-producing countries are, in descending order, Poland, Spain, France, Germany, Italy and the Netherlands. The EU's main export destinations are the UK, Ghana, Congo, Ukraine and Saudi Arabia, and its main import partners are the UK, Brazil and Thailand (EC, 2023).

We should definitely mention that the poultry market is segmented. The main types of poultry are chicken, turkey, ducks, and other poultry. According to The Business Research Company, 2023 report

in 2019 the total poultry sector is divided into 87.9% of chicken, 6% of turkey, 3.7% of duck and the remaining value from other poultry sales segments (The Business Research Company, 2023). In 2022, also chicken meat dominates the poultry sector, the production volume was 101 million tons (USDA, 2023). In the case of chicken the main producing and consuming country was the US (20.8 million tons). In production China and Brazil have the same level, more than 14-14 million tons. These three countries account for 49% of the total production. US, China and EU consumption account for 42% of total world chicken consumption. The main chicken meat exporters are Brazil and US, the main importers are Japan, Mexico and China.

In the turkey sector of the 6 million tonnes of turkey meat produced in the world in 2020, the USA will have the largest share with 44%, followed by Brazil with almost 10%, then the EU countries with 32%. Hungary is the 12th largest producer of turkey meat in the world with a 1.36% share of the global market, according to FAOSTAT, 2022. In 2020, 82% of EU poultry meat production was broiler chickens, 14% turkeys, 3% ducks and 1% other poultry (EC, 2022<sub>B</sub>).

According to OECD – FAO, 2021; FAO, 2022; AVEC, 2022; EC, 2022<sub>A</sub>; USDA, 2023 forecasts, the amount of poultry meat produced and consumed in the European Union will increase in the future. Consumers are attracted to poultry because of the lower prices, the stability and adaptability of the product, and the higher protein and lower fat content. Poultry meat consumption worldwide is projected to increase to 152 million tonnes over the forecast period. The projected strong growth rate in per capita consumption reflects the important role poultry meat plays in the national diets of many populous developing countries, including China and India (OECD – FAO, 2021).

World poultry consumption per capita was 14.8 kg in 2019-2021 average. Global per capita consumption of poultry is projected to by 2031, rising to 15.8 kg/capita/year. Compared to 161 countries, Israel has the highest per capita consumption of poultry meat in 2020 at 68.9 kg, and Chad has the lowest at 0.48 kg. The per capita poultry consumption in the EU was 23.5 kg in the same period which will increase to 25.2 kg by 2031 (OECD - FAO, 2022), so poultry will remain our second most consumed meat product in Europe.

Within the poultry meat consumption, the per capita consumption of turkey meat is slightly but decreasing in the EU member states, it was 4.1 kg by 2020. The Germans had the most significant per capita consumption in 2020 (5.8 kg), followed by the French (4.5 kg), and the Austrians in third place (4.4 kg). The EU consumption is lower compared to the US per capita consumption of turkey meat, which was 7.1 kg/capita/year in 2020, which decreased slightly from 7.5 kg/capita/year in 2016 (AVEC, 2021).

In the EU, poultry meat is the only meat type whose per capita consumption will increase in the future. This growth is driven by the continuing change in consumer habits, which is benefiting poultry meat. The increase in per capita consumption is due to the healthier image of poultry meat compared to other meats (in particular pork), it's easier preparation and the fact that it is not affected by any religious restrictions on its consumption (Vida and Szűcs, 2016; EC, 2021; EC, 2022<sub>A</sub>). Migration is also contributing to the shift in meat consumption towards poultry meat (EC, 2018). In recent years, the COVID-19 epidemic has changed our dietary and consumption habits (Keller and Huszka, 2021, Huszka et al., 2022), bringing with it many new restrictions and strict regulations that have affected our entire lives (Vida and Popovics, 2020).

In *Table 2*, we can see the European country's per capita meat consumption by type in 2020. In *Table 2*, data refers to meat 'available for consumption', but the actual consumption may be lower after correction for food wastage. The household sector should pay attention to their food-wasting behaviour, and information and marketing campaigns to help them significantly reduce the amount of food waste generated in their households (Balogh, 2010; Vida et. al., 2022). The quantity of food consumed in natural units is one of the most important household food consumption indicators (Balogh, 2008), but often different databases calculate in different ways. In the next table, there are data from the FAOSTAT database, which differ from the data of the Hungarian Central Statistical Office (which contains the actual quantities of meat consumed). FAOSTAT's data is interesting because it allows you to compare the types of available meat in each European countries.

**Table 2: The kilogram per capita meat consumption by meat type in Europe (2020)**

<b>Countries</b>	<b>Poultry</b>	<b>Beef</b>	<b>Sheep and goat</b>	<b>Pork</b>	<b>Other meats</b>	<b>Fish and seafood</b>	<b>Total meat consumption</b>
<b>Albania</b>	11,71	13,20	8,68	6,56	0,56	8,64	49,35
<b>Austria</b>	17,72	16,04	1,15	46,69	0,58	13,89	96,07
<b>Belgium</b>	12,54	13,00	1,15	32,39	1,89	22,80	83,77
<b>Bosnia and Herzegovina</b>	16,82	10,30	0,61	9,80	0,27	5,84	43,64
<b>Bulgaria</b>	22,78	3,93	1,38	31,61	0,19	7,31	67,20
<b>Croatia</b>	16,57	13,36	1,50	52,96	0,95	18,99	104,33
<b>Cyprus</b>	25,94	6,81	4,96	38,60	0,14	24,57	101,02
<b>Czechia</b>	22,83	10,70	0,33	45,00	1,03	9,28	89,17
<b>Denmark</b>	25,22	24,23	0,73	25,85	0,93	26,54	103,50
<b>Estonia</b>	21,97	9,12	0,48	37,00	0,15	14,66	83,38
<b>Finland</b>	19,82	18,31	0,58	32,71	1,14	33,50	106,06
<b>France</b>	23,39	21,44	2,54	31,92	1,12	34,24	114,65
<b>Germany</b>	18,01	14,49	0,82	42,21	0,87	12,63	89,03
<b>Greece</b>	25,61	14,97	8,49	28,87	1,96	19,62	99,52
<b>Hungary</b>	26,61	4,75	0,15	51,93	0,16	6,34	89,94
<b>Iceland</b>	31,38	15,35	22,05	21,28	2,68	91,18	183,92
<b>Ireland</b>	26,71	20,06	3,43	30,72	0,59	22,82	104,33
<b>Italy</b>	18,76	16,75	0,88	37,82	1,19	29,82	105,22
<b>Latvia</b>	20,96	5,78	0,38	41,57	0,37	24,74	93,80
<b>Lithuania</b>	30,25	5,07	0,45	47,82	0,43	32,59	116,61
<b>Luxembourg</b>	19,34	25,80	1,20	32,20	1,18	31,00	110,72
<b>Malta</b>	25,38	18,86	1,20	24,93	0,21	32,51	103,09
<b>Montenegro</b>	16,42	13,19	2,38	44,72	0,05	14,08	90,84
<b>Netherlands</b>	5,34	16,26	1,03	26,15	3,56	21,91	74,25
<b>North Macedonia</b>	20,03	7,89	0,70	8,88	0,34	6,21	44,05
<b>Norway</b>	20,11	17,23	5,23	24,55	1,52	50,57	119,21
<b>Poland</b>	28,51	1,01	0,03	54,15	0,10	12,44	96,24
<b>Portugal</b>	32,68	18,84	2,34	40,46	1,05	57,19	152,56
<b>Romania</b>	23,85	5,64	2,51	37,48	0,27	8,27	78,02
<b>Russia</b>	31,35	13,15	1,40	27,09	3,39	20,06	96,44
<b>Serbia</b>	12,72	7,24	3,33	38,00	0,23	6,22	67,74
<b>Slovakia</b>	14,79	5,69	0,05	35,71	1,08	9,68	67,00
<b>Slovenia</b>	24,15	14,76	0,89	28,18	0,53	11,96	80,47
<b>Spain</b>	33,34	13,71	2,05	55,21	1,63	42,40	148,34
<b>Sweden</b>	17,10	22,34	1,41	29,50	0,13	32,39	102,87
<b>Switzerland</b>	17,34	20,69	1,48	29,97	1,19	16,71	87,38
<b>Turkey</b>	20,65	13,12	5,39	0,00	0,01	4,77	43,94
<b>Ukraine</b>	27,20	7,76	0,32	17,36	0,45	11,81	64,90
<b>United Kingdom</b>	33,14	16,52	4,45	23,95	0,93	18,50	97,49
<b>EU-27</b>	22,21	14,09	1,48	40,45	1,05	23,86	103,14
<b>World</b>	15,75	8,94	1,97	15,48	0,67	19,75	62,56

Source: Authors' own compilation based on FAOSTAT, 2022

According to the FAOSTAT, 2022 the average meat consumption in the world is 62.5 kg/capita/year. In the EU, this value is much higher, more than 100 kg/capita/year. If we analyse the structure of meat consumption, we can say that fish and seafood (19.7 kg/capita/year), poultry meat (15.7 kg/capita/year), pork meat (15.4 kg/capita/year) and beef (around 9 kg/capita/year) are consumed to the greatest extent in the world. The consumption of other types of meat is negligible. The map of average meat consumption in the EU-27 is significantly different. The highest consumption is pork (44 kg/person/year), followed by fish and seafood (24 kg/person/year), poultry (22 kg/person/year) and beef (14 kg/person/year) consumption. Pork consumption is nearly 40% of total meat consumption.

The pork meat – as the most consumed type of meat in the European Union – consumption is the highest in Spain, Poland, Croatia and Hungary. Beef meat consumption is relatively high in Luxembourg, Denmark, Sweden and France. Sheep and goat meat consumption is the highest in Iceland and Albania (due the religious customs). Consumption of fish and seafood is high where geographical conditions allow it (Iceland, Portugal, and Norway) (Table 2.).

Examining per capita poultry consumption by Member State, we found that the highest poultry consumption was in Spain (33.3 kg), the UK 833.1 kg) and Portugal (32.6 kg) and the lowest consumption was in the Netherlands (5.3 kg) and Belgium (12.5 kg).

According to KSH, 2022<sub>A</sub>, per capita poultry meat consumption in Hungary was 16.5 kg in 2010, rising to 25.2 kg in 2020, an increase of 52.5% in a decade. The increase in per capita consumption has made poultry meat the leading meat product in Hungary. Analysing the poultry meat consumption by age group in Hungary, we can conclude that the most dynamic increase in per capita poultry consumption in 2020 compared to 2010 was among young people (under 25 years old) (+85%). However, poultry consumption is the highest among people aged 65 and over (33.8 kg/person/year) and lowest among people aged 25-54 years (21.7 kg/person/year). Looking at household composition, poultry meat consumption is highest in households with a majority of elderly people. In relation to educational level, it can be observed that the consumption of poultry meat tends to decrease as educational level increases (Table 3.).

**Table 3. The kilogram per capita poultry meat consumption in Hungary by age group, educational level and the type of household**

Year	Total	Under 25 years	25-54 years old	55-64 years old	65 years and older	primary or no education	secondary school without graduation	secondary school with graduation
2010	16,5	12,9	14,2	20,4	21,7	19,5	16,4	15,0
2015	19,2	17,8	16,3	24,4	24,9	22,5	20,0	19,4
2016	19,3	16,9	16,9	21,5	26,0	23,7	19,1	18,5
2017	20,0	16,2	17,6	24,2	25,3	23,5	21,2	19,4
2018	20,9	19,3	17,2	25,9	28,6	25,4	21,4	20,3
2019	23,1	20,5	19,3	28,5	31,0	27,9	25,7	22,4
2020	25,2	23,8	21,7	29,4	33,8	31,3	26,3	24,4
Year	higher education	only young people	only middle aged	only old people	only young and middle-aged	only young and old	only middle-aged and elderly people	young, middle-aged and elderly
2010	14,3	11,1	20,3	23,2	13,7	15,0	22,1	13,3
2015	15,4	14,8	23,9	28,4	15,0	14,6	24,5	14,4
2016	16,9	14,2	26,4	27,6	15,4	16,8	20,9	13,5
2017	16,8	19,8	25,6	26,8	16,0	16,6	23,7	15,7
2018	18,0	20,2	27,7	30,8	15,4	24,8	23,9	15,6
2019	18,1	21,8	28,9	32,9	18,1	19,5	26,7	17,4
2020	21,3	26,1	32,1	35,8	18,8	20,8	28,9	23,2

Source: Authors' own compilation based on KSH, 2022<sub>A</sub>

According to KSH, 2022<sub>B</sub> data, there are significant regional differences in poultry meat consumption: people living in smaller towns consume more poultry meat than people living in urban areas do. The most poultry meat is consumed in the North Great Plain (32.7 kg), South Transdanubia (29.3 kg) and North Hungary (26.8 kg) in 2020, with consumption in these regions exceeding the Hungarian average (25.2 kg). The lowest consumption of poultry meat is in the Central Transdanubian (20.8 kg) region in 2020. These consumption data in Hungary contradict the trend that young consumers in larger urban areas consume poultry meat more. The meat consumption by the type of settlement shows that the highest poultry meat consumption is in the villages (29.6 kg/capita), smaller cities (24.1 kg/capita) in 2020 (Table 4.).

**Table 4. The kilogram per capita poultry meat consumption in Hungary by region and type of settlement**

Year	Total	Central Hungary	Central Transdanubian	West Transdanubian	South Transdanubia	North Hungary
2010	16,5	15,1	14,1	13,6	15,4	16,5
2015	19,2	16,0	16,7	14,6	19,9	22,6
2016	19,3	16,4	16,6	13,8	26,1	22,2
2017	20,0	16,5	17,0	13,5	24,7	20,2
2018	20,9	17,6	18,4	14,0	23,4	22,2
2019	23,1	19,9	20,1	16,5	26,1	23,9
2020	25,2	22,7	20,8	22,0	29,3	26,8
Year	North Great Plain	Southern Great Plain	Capital city	County seat, city with county rights	Other cities	Village
2010	19,1	21,7	12,1	16,8	16,7	18,5
2015	24,3	23,0	15,7	18,4	19,5	21,5
2016	22,8	20,8	16,3	18,0	19,6	21,4
2017	24,6	27,2	16,4	18,3	20,1	23,0
2018	28,0	25,4	18,5	19,5	19,8	24,5
2019	31,5	26,1	19,3	20,8	21,9	28,2
2020	32,7	24,6	23,7	21,8	24,1	29,6

Source: Authors' own compilation based on KSH, 2022<sub>B</sub>

Regional differences in consumption can also be observed in other livestock sectors (Huszka et al., 2008; Fülöp et al., 2009; Vida and Feketéné Ferenczi, 2022). In addition to statistical data, it is also worth looking at primary research studies. A Hungarian study found that the preference for poultry meat depends on the consumer's age and place of residence, with the preference for poultry meat being highest among people aged 50 and over, young people under 34 and those living in cities with county status. People in better financial circumstances consume more poultry meat than people with lower social status (Huszka et al., 2018).

Although turkey meat has many physiological advantages, it is still not a very popular product among Hungarian consumers. According to the latest data, Hungarians consume an average of only 4 kilograms of turkey meat per person per year. This could and should be changed by encouraging consumption, because consumption has stagnated in the past period, one of the reasons for which can be mentioned is that due to the epidemic, factory kitchens and restaurants, where a significant part of turkey consumption was concentrated, were closed (BTT, 2021).

As a general domestic trend, it can be mentioned that, in addition to chicken, more and more people are opening up to turkey, which is good news, since we can make a lot of delicious dishes from different parts of the animal, and it is also considered a particularly healthy ingredient. You can find it pre-packaged on the shelves of all major stores and shops, or at the butcher's counter, and in terms of price, it is not considered a very expensive product (although it is more expensive than chicken in Hungary).

If someone is open to a healthy diet or wants to eat other poultry besides chicken, then turkey can be a particularly good choice (Agrárszektor, 2021).

To sum up the consumption analysis, we can conclude, the per capita consumption of poultry in Hungary will increase in the future, so poultry meat consumption is dominant in the consumption of meat types. According to OECD – FAO, 2022, in the long term, per capita poultry consumption in the EU increased by 79% in 2018 (24.4 kg) compared to 1990 (13.7 kg) - while other meat products have decreased over this period (pork consumption decreased by 4% and beef by 19%) - and this increase will continue in the future. After the analysis of consumption data, a thorough analysis of purchasing habits is needed to see what consumers consider when buying meat. The most important influencing factors for customers when buying food products, such as poultry products, are freshness, texture, hygienic display and then price (Szakály, 2016). In terms of the importance of factors influencing the selection, the healthiness and origin of the products are also important (Huszka and Dernóczy-Polyák, 2015).

The national origin of products is becoming an increasingly powerful factor influencing purchases, with an increasing number of consumers demanding information about the origin of products and their way to the store (Nábrádi et al., 2017), which shows the strengthening of consumer ethnocentrism in poultry consumption. Another survey, which examined the frequency of poultry meat purchases by gender, found that women purchase more of this meat weekly than men do. The increase in the frequency of poultry meat purchases can be associated with higher educational attainment (Szakály, 2016; Huszka et al., 2018).

After analysing the past, it is worth looking at the trends that will determine future purchasing habits. Poultry meat is essentially a product bought through offline channels, but the market for online options will develop afterward. Thanks to the rapid development of technology, food ordering and delivery via computer, mobile phone, or app are on the rise, creating a new market opportunity not only for restaurants but also for everyday shopping.

Both the present and the future are being shaped by health and environmentally conscious consumer groups, which the literature refers to as LOHAS (Lifestyle of Health and Sustainability) groups (Kiss et al., 2018). The new decision-making aspect is most relevant in the food sector, where recent food scandals have highlighted the dangers (Törőcsik, 2007). These trends have already led to the appreciation of free-range, farm-raised, yellow-skinned, high-quality, healthy poultry/chicken meat, which meets the most ethical husbandry requirements, animal welfare standards and consumer demands, and could become a successful product for the poultry industry in the future. It can also be observed that the number of restaurants that offer healthy, modern diet chicken dishes delivered to our homes is increasing. Thus, in addition to the healthy quality of the meal, the need for the comfort function is also satisfied. It is also worth mentioning the use of chicken in fast food restaurants, as it is quite significant, just think of the biggest ones: McDonalds, KFC, Burger King.

Consumers are looking for safe, traceable, healthy and high-quality food. Because of changing production and consumer needs and expectations, poultry farmers in Hungary and Europe have been producing, processing and selling free-range poultry for several years.

Poultry meat has increasingly evolved from a commercial product to a premium food product and is therefore no longer considered a product of the average consumer (Huszka et al., 2018). The demand for poultry products with added value and quality is expected to continue to grow among consumers of premium products (Aliczki et al., 2013; Huszka, 2017).

Regarding meat consumption, Fehér and Szakály, 2017 found that Hungarians are most likely to eat poultry and pork. This is supported by a study on the preference for meat, with chicken (4.68) and pork (4.37) topping the list on a five-point scale (Keller and Ertsey, 2020). Those who like and consume poultry meat consume on average 2.6 times a week (Huszka and Polareczki, 2008).

A representative survey of 1 000 consumers by Szakály (2016) showed that some consumers buy large quantities of poultry meat at once, which they do not prepare fresh but freeze for later use. In research also aimed at the consumption of fresh meat (n=1023), the participants mostly preferred poultry meat, among poultry products, chicken meat, including chicken breast (29.9%), was the most popular, duck meat (0.7%) and turkey meat (2.2%) hardly made any purchases (Huszka et al., 2018). In Hungary, when we talk about poultry meat, it is not equal to chicken meat consumption, but the distribution above also shows that the consumption of other poultry meat (turkey, duck, goose) is not significant. The consumers of chicken and turkey meat are mostly women (Vida, 2013), according to a survey, they prefer to eat chicken dishes on an annual average and according to their opinion, the consumption of

chicken and turkey meat reduces the risk of chronic diseases (Nábrádi et al., 2017). Chicken consumers generally prefer chicken with a full, muscular breast and thigh. For this reason, further processed, cut or ready-to-cook products have recently increasingly replaced whole chickens.

Chicken and turkey meat is the preferred animal protein compared to the more expensive beef and pork products. In the context of food inflation and higher energy costs, EU chicken meat consumption will remain strong in 2022 and 2023. While special production schemes including organic, free range and GMO-free chicken are widely supported throughout the EU, sales of inexpensive chicken meat cuts continue to grow faster than sales of more expensive products like breasts and whole birds (USDA, 2022).

Despite the similar position of chicken and turkey, there are significant differences in their purchasing and consumption habits. To be precise, there are significant differences in the frequency of shopping, the place of shopping, the shopping aspects and the preparation methods. There is a positive shift in the direction of turkey meat, but many people are still uncertain about the preparation of turkey meat, so they prefer not to choose it. The consumption of turkey in Hungary corresponds to the EU average consumption (4 kg/person/year). In order to increase consumption, the future of turkey meat lies primarily in cooked products, but fresh meat must also find its place in the meat industry.

After the 2022 peak, EU poultry prices are expected to fall and stabilise (EC, 2022<sub>A</sub>). When buying poultry meat, consumers try to get the product at a reasonable price, however, it is far from clear that they prefer products available at discounted prices Szakály (2016), but the price is a determining factor when buying poultry (Kincaid, 2018). Consumer loyalty is far from stable, despite the active loyalty programs of some retail chains (Szakály et al., 2020).

Among the offline channels, shopping from the butcher and shopping in hyper- and supermarkets and discount stores should be highlighted as the largest market. We should also mention a market segment that prefers the direct sales channel, i.e. they buy freshly slaughtered, ready-to-cook chicken from home. The rise of international trade chains is also reflected in the selection of Hungarian poultry products. Consumers typically buy meat products in supermarkets and hypermarkets, mainly asking for fresh meat (78.4%). Discount stores (e.g. Lidl, Penny, Aldi) were chosen by 11.9% and convenience stores by 7.5% (Huszka et al., 2018).

#### 4. CONCLUSIONS

In world production and trade China, the US, the EU and Brazil dominate the poultry sector. Within poultry, chicken is the most important type of meat, followed by turkey. As the above-mentioned and analysed several research has highlighted, consumers buy poultry meat because they want to eat it in an enjoyable and healthy way. Poultry meat is perfectly suited for this purpose, as it is an easy and versatile meat with a neutral taste, widely consumed and easily integrated into a modern diet, without any concerns about ethical or environmental impact, or religious restriction. The ethical concerns associated with environmentally conscious consumer behaviour do not affect the consumption of poultry meat (especially chicken meat), which is one of the meat types with the lowest emissions, making it a favourable alternative for conscious consumers and flexitarians. Poultry meat is the second highest consumed type of meat in the world (15.7 kg/capita/year). Its global popularity also means that it does not have to face any consumption restrictions from an ethical, environmental or religious point of view. In addition to the above-mentioned advantages, poultry meat is a relatively cheap raw material; nowadays, poultry/chicken meat is an essential source of protein for many nations.

Poultry is the third highest consumed meat in the EU-27, and the most consumed type of meat in Hungary. Forecasts indicate that consumption will continue to follow a similar trend in the future, and that poultry meat will continue to be the leading meat product in the world. In the EU, poultry meat is the only meat type whose per capita consumption will increase in the future. In Hungary, poultry meat retains its additional advantage over other meat types. Within poultry the consumption of turkey meat in Hungary corresponds to the EU average (4 kg/person/year). There is a lot of potential in the turkey, both from the side of production and consumption in Hungary, the European Union and the world. In order to increase consumption, the future of turkey meat lies primarily in processed, pre-cooked food products, but fresh meat must also find its place in the meat industry. Turkey meat should be repositioned among Hungarian consumers, especially from an emotional point of view, as there is some internal emotional resistance among consumers regarding the consumption of turkey meat. They know that it is



healthy and reliable, but for some reason they choose chicken instead. White meat is particularly popular with young people, who often reject red meat for environmental, ethical and animal welfare reasons. Turkey meat can be a transition between white meat and red meat in the sense that you can get both types of meat at the same time, depending on which part of the body you eat. The young generation, as the consumers of the future, should be made more open to the consumption of turkey meat, thus creating a long-term culture of consumption in households, as turkey meat has a place on the consumer's table.

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