

HUNGARIAN RABBIT MEAT EXPORT IN THE ASPECT OF THE WORLD MARKET

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ABSTRACT

Hungary is at the 10th place in the rabbit meat production (8,000 tons in 2005). Since 97% of slaughtered rabbits are exported and Hungary is at the 2nd-3rd place in the rabbit meat export, that is why the continuous estimation of available and potential markets is essential. According to the database of FAOSTAT our main competitors are China, Argentina, France, Spain and Italy. On the basis of the data of 2005, Hungary exports most of the rabbit meat to Italy (42.2%), Switzerland (26.0%), Germany (19.6%) and Belgium (6.3%). On the other hand, these countries are the main rabbit meat importers (in 2005 Germany: 6.141, Belgium: 3.694, France: 3.502, Italy: 2.887 and Switzerland: 2.636 tons). In terms of the Hungarian rabbit meat export, the continuous decrease of the Italian import is disadvantageous, furthermore there is no prospect of increasing the 75.7% (2005) of Hungarian sharing. The Swiss import also decreases and the Hungarian sharing is also high there (52.2% in 2005). The German rabbit meat import has been improving during the last years. Although Hungary is one of the main exporters (16.7% in 2005) the highest numbers of exporters compete for this market. The Hungarian rabbit meat export could be increased only in new markets. In terms of stability of the Hungarian rabbit production the stimulation of home consumption has a great importance.

Key words: Rabbit meat, Production, Export, Import, World market.

INTRODUCTION

World's rabbit meat production is continuously increasing; however its rate could be lower or higher. Previously Italy was but now (in the last 10 years) China is the greatest producer. France, Spain and Egypt are also great producers (EFSA, 2005; Szendró and Szendró, 2007). Hungary is about at the 10th place among countries that produce rabbit meat; although the amount of the production which is only 1% of the world's production does not seem to be important, but it is determinant in the export. Since 97% of the purchased rabbits is exported (Kling, 2006, 2007) Hungary is one of the greatest rabbit meat exporters (Szendró, 2004). In consequence of export orientation international markets have a considerable influence on the Hungarian production and price.

For this reason the Hungarian rabbit meat production and export are examined in the aspect of the world market.

MATERIALS AND METHODS

All of the data (production, export, import) were collected from the database of FAOSTAT (<http://faostat.fao.org>). Data downloaded from different database did not always correspond and sometimes data were available only until 2004 but sometimes until 2005. FAOSTAT helpdesk team suggested using the data of detailed trade flows instead of that of quantity of primary commodity. Consequently, database between 1990 and 2005 of <http://faostat.fao.org/DesktopModules/Faostat/WATFDetailed2/watf.aspx> were used to export and import data collection while that of

<http://faostat.fao.org/site/340/default.aspx> were used to production data collection. In tables countries are ranked on the basis of the data of 2005.

RESULTS AND DISCUSSION

Figure 1 shows the changes in rabbit meat production between 1990 and 2005. The highest increase can be seen in the production of China (Table 1). Therefore its role in the world's production and export also increased. Italy is at the second place. Spain fell back to the 5th place in 2005 since its production decreased after 2000. In spite of the continuous decrease in production, Hungary is at the 10th place in the order.

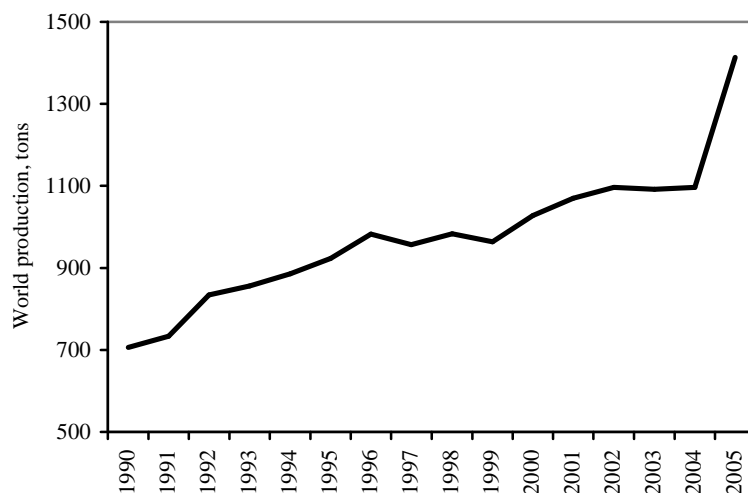


Figure 1: The World's rabbit meat production between 1990 and 2005
(<http://faostat.fao.org/site/340/default.aspx>)

Table 1: The leader countries of the World in rabbit production (tons)

Countries	1990	1995	2000	2005
China	96,000	268,690	370,650	500,680
Italy	201,030	209,800	221,000	225,000
France	93,000	91,200	84,600	87,200
Egypt	49,680	62,400	69,600	77,280
Spain	71,310	111,120	104,540	75,470
Czech Republic	-	33,800	38,350	40,360
Germany	33,600	34,030	33,980	34,150
Ukraine	-	19,400	13,900	13,460
Russia	-	11,200	6,500	8,480
Hungary	17,280	15,000	14,000	8,000

Source: <http://faostat.fao.org/site/340/default.aspx>

In spite of this Hungary has a great importance in export. It is unique that only 3% of slaughtered rabbits is sold in the national market while 97% of it is exported (Szendrő, 2004; Kling, 2007). This is why it is important to know exactly the commerce of the other exporters especially which merchandising in the same markets.

Previously, 90% of slaughtered rabbits were exported to Italy. As Table 2 shows, the Italian market represents less and less ratio from decreasing export (in 2005 42.2% from 5,331 tons). The reason of this is the decreasing Italian import due to their increasing self-supplying. The Hungarian rabbit meat exported to Switzerland also has an importance (25-30%). Swiss market has become determinant since the built of a Swiss owned slaughterhouse. Export to Germany increases year by year, it is about 20% (19.5% in 2005). The German purchase lots of rabbits and it seems that Hungarian products are marketable in this market of high standards. Sharing of other countries in Hungarian rabbit meat export is low except Belgium (6.3% in 2005).

Table 2: The Hungarian rabbit meat export and its distribution (fresh, chilled or frozen)

	1991	1995	2000	2005
Total export (tons)	20,607	8,364	5,199	5,331
	Distribution (%)			
Italy	92.0	73.1	56.8	42.2
Switzerland	4.3	18.7	30.9	26.0
Germany	2.1	3.6	8.3	19.6
Belgium	-	-	1.2	6.3
France	0.7	1.1	0.8	2.6
Russian Fed.	-	-	0.5	2.1

Source: <http://faostat.fao.org/DesktopModules/Faostat/WATFDetailed2/watf.aspx>

Which are the main competitor countries?

Besides being the greatest producer, China is the greatest rabbit meat exporter as well (Table 3). It is not possible to compete with low prices, but it is with quality. On the one hand China exports only frozen meat to Europe, although in many countries chilled meat is preferred. On the other hand, the European consumers' demands on welfare, treatments and traceability are well performed by EU member-states. In 2005 Argentina was the second exporter of rabbit meat in the world. Similar things can be told about Argentina like about China, however, in markets with high quality standards the Hungarian rabbit meat is more preferred.

Table 3: The leader countries of World in rabbit meat export (tons)

Countries	1990	1995	2000	2005
China	17,627	20,244	22,554	8,925
Argentina	4,388	5,533	3,410	6,093
Hungary	17,302	8,364	5,199	5,331
France	4,531	4,340	5,823	5,048
Spain	195	2,018	4,373	4,182
Italy	153	786	2,042	3,141
Belgium	?	?	2,330	2,649
The Netherlands	1,570	3,422	8,716	1,149

Source: <http://faostat.fao.org/DesktopModules/Faostat/WATFDetailed2/watf.aspx>

French rabbit meat export is important as it always was (Table 3). Spain and Italy have increased their export thus they are also determinants. Belgian export increases, while Dutch export is market dependent. With the appearance of BSE the value of rabbit meat rose and the Dutch export started to increase (it was 11.151 tons in 2001), while with the decrease of price the export also decreased. Hungary could compete with other EU states only in price or quality since there are the same EU regulations in all countries.

Countries where Hungary exports rabbit meat are among the greatest importers. Germany is at the first, Italy is at the fourth while Switzerland is at the fifth place (Table 4). German import is continuously high while the Swiss and Italian import decrease, which is quite drastic in the latter country. These data proves that it is not possible to improve Hungarian rabbit meat export to Italy and Switzerland.

Table 4: The leader countries of the World in rabbit meat import (tons: fresh, chilled or frozen)

Countries	1990	1995	2000	2005
Germany	3,301	8,213	6,423	6,141
Belgium	?	?	2,745	3,694
France	12,280	7,476	8,070	3,502
Italy	17,681	7,535	3,986	2,887
Switzerland	4,095	3,363	3,179	2,636
The Netherlands	1,159	5,124	11,022	2,224
Greece	213	506	3,232	1,092
Japan	5,681	3,096	1,713	411

Source: <http://faostat.fao.org/DesktopModules/Faostat/WATFDetailed2/watf.aspx>

Who are the main competitors in these countries?

Three-quarters of the Italian import still come from Hungary (Table 5). In terms of this position it is very important that one of the Hungarian slaughterhouses is in Italian ownership. Even if this high proportion (75.7% in 2005) remains it is not possible to improve our export since Italy becomes more and more self- supplier to such an extent that Italy is also an exporter.

Table 5: The Italian rabbit meat import and its distribution (fresh, chilled or frozen)

	1990	1995	2000	2005
Total import (tons)	17,681	7,535	3,986	2,887
	Distribution (%)			
Hungary	84.3	80.5	72.1	75.7
Croatia	-	2.4	-	12.1
France	1.4	3.4	14.0	6.2
Spain	-	-	8.5	3.8
Czech Republic	?	4.6	2.6	-
China	2.1	6.7	2.3	-

Source: <http://faostat.fao.org/DesktopModules/Faostat/WATFDetailed2/watf.aspx>

Sharing of Hungarian rabbits in Swiss import is above 50% (Table 6). Since stopping the Chinese import the missing amount of rabbit meat has been importing from neighbouring countries such as Germany, France and Italy. Thus, it is not possible to improve our export to this market.

Table 6: The Swiss rabbit meat import and its distribution

	1990	1995	2000	2005
Total import (tons)	4,095	3,363	3,179	2,636
	Distribution (%)			
Hungary	7.5	54.9	51.1	52.2
Germany	-	0.1	0.1	18.5
France	34.9	23.7	23.	16.2
Italy	3.5	7.2	11.0	8.7
Argentina	2.6	3.3	2.0	3.4
China	2.4	4.4	12.1	-
Poland	10.7	0.6	-	-

Source: <http://faostat.fao.org/DesktopModules/Faostat/WATFDetailed2/watf.aspx>

Hungarian rabbit meat export to Germany as well as its sharing in the German import has improved for some years (Table 7). On the other hand the competition for the market is the highest in this country. Our export to Germany could be increased with higher quality, with dependability and with better satisfaction of consumers' demands.

Table 7: The German rabbit meat import and its distribution (fresh, chilled or frozen)

	1991	1995	2000	2005
Total import (tons)	5,283	8,213	6,423	6,141
	Distribution (%)			
China	19.0	40.2	30.5	16.9
Hungary	8.9	2.7	5.6	16.7
France	14.3	14.4	23.3	16.1
Italy	1.1	0.8	4.8	13.4
Poland	34.1	11.3	4.8	11.6
Bulgaria	0.3	-	-	6.1
Czech Republic	-	18.5	9.0	5.9
The Netherlands	19.2	11.4	20.9	3.5
Argentina	-	-	-	3.1
Belgium	-	-	0.5	1.8

Source: <http://faostat.fao.org/DesktopModules/Faostat/WATFDetailed2/watf.aspx>

CONCLUSIONS

Besides stagnating or decreasing rabbit production, exporting rabbit meat will be more and more difficult. In consequence of decreasing Italian and Swiss markets as well as on the high sharing of

Hungarian rabbit meat in these countries our aim could be retaining our export at the present level. In spite of the high competition, Hungarian export to Germany and to Belgium can be improved; however, this needs more efficient market analysis and marketing. Nevertheless, it would be very important to work harder to obtain other markets. In spite of the high quality of Hungarian rabbit meat, competitive and more stable background for producers can only be expected in case of increasing the rabbit meat consumption in Hungary.

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