

RABBIT PRODUCTION IN HUNGARY

RECENT TRENDS

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Abstract - Hungarian Rabbit production has already been described in previous publications but its evolution during the last years makes necessary a Study of its importance and of its Structure. The main phenomena is the giving up of the big State or Coop Farms and their substitution by private farms using West European methods. Nevertheless, more than 90 % of the Production keeps on coming from small farms. As a consequence of the 93 Summer price crisis, total Hungarian Rabbit Meat Production has decreased and can be globally valued at 12,000 tons per year. Simultaneously, the Hungarian Rabbit Meat Export has decreased by 50 % about with a shrinkage of the Italian Imports and a Development of Swiss Imports. Besides, Rabbit Collecting and Slaughtering appear to be more and more concentrated between few companies and Hungary is now exporting a part of its Rabbit Meat as a processed product. Finally, a small Domestic Consumption is developing.

INTRODUCTION AND METHODS

Hungarian Rabbit production has been described in previous publications (LEBAS 1975, JOUVE 1989) dealing with its Organization during the Socialist Period (CSIVARY 1980; CAMPS 1983). This data together with private information and with several field surveys enabled us to carry out a 92 -93 Hungarian Rabbit Production Description (COLIN et LEBAS 1995). During the last years, the numerous political, social and economical changes have provoked a drastic evolution of this Hungarian Rabbit Production. Consequently, this publication presents the current situation of the Hungarian rabbit production at the beginning of 1996, emphasizing the main differences existing from the situation 3 years ago.

It synthesizes the official statistics of the Hungarian Ministry of Agriculture, the datas of the Hungarian Rabbit Product Council and some private commercial information of feed companies and of rabbit slaughtering plants.

STRUCTURE OF THE PRODUCTION

From a general point of view, the switching of the Hungary from a Socialist Economy to a Free Market one has a lot of consequences in term of Rabbit Production Organization. The previously described (COLIN et LEBAS 1995) big State or Coop Farms (Dunavarsány, Bikal, Környe) have completely finished their activities. They have been partly privatized and partly closed.

Simultaneously, 30 - 35 middle and big private farms about have been created by hungarian or foreigner private investors (Table 2) and represent now 15,000 does about (including the 2 experimental farms of Gödöllő and Kaposvar universities).

Table 1 : Current situation of some previously Coop or state big rabbit farms

Previous name	Location	Highest capacity (Number of does)	Current situation (number of does)	Situation
Dunavarsány coop	Baja 180 kms south Budapest	14,000	700	Closed down in 1991
State farm Környe	Körnje 50 kms East Budapest	5,000	700	Private
Bikal	200 kms West Budapest	6,000	3,500	Private owner

Table 2 : Number of private middle and big rabbit farms in Hungary (1)

Size (number of does / farm)	Number of farms	Total number of does
> 1,000	3	5,600
500 - 1,000	5	3,550
150 - 500	9	2,650
50 - 150	15	1,500
Total	32	13,300

(1) Including Kőnyé farm, Bikal farm and the two university farms

Table 3 : Distribution of the number of does between the small and the middle big farms (State owned and private) in Hungary

	End's of the 80's		Current situation	
	Number	%	Number	%
Small farms (< 50 does)	460,000	94	240,000	94
Middle big farms (> 50 does)	30,000	6	15,000	6
TOTAL	490,000	100	255,000	100

The development of such big farms is encouraged by the slaughtering plants and these big farms adopt very modern methods of Management coming mainly from Italy and from France.

Nevertheless, it has to be emphasized that till now, the drastic changes at the big farm level have little influence on the total Hungarian Rabbit Production Structure. This one keeps on coming at more than 90 % from about 20,000 does farms of 10 - 20 does each one as described by KUSTOS et CSONKA (1992) and by KUSTOS (1994) (Table 3). Probably, in a next future, the importance of the private middle - big farms will strongly increase : in January 96, 3 new industrial farms representing 3,000 does are planned.

QUANTITATIVE IMPORTANCE OF PRODUCTION

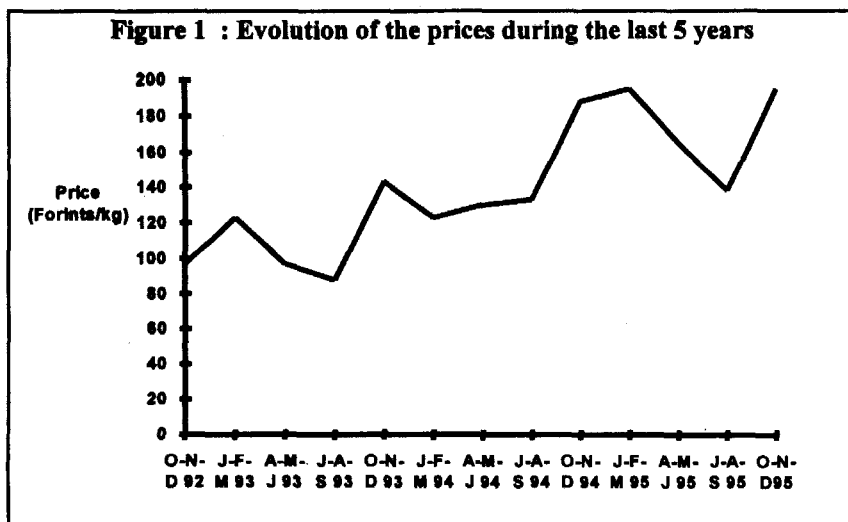
Table 4 : Evolution of the Hungarian export during the 90's

Year	Exported meat (Tons/year)	Equivalent number of rabbits (000)
1990	16,876	13,364
1991	19,780	14,790
1992	18,864	14,100
1993	14,410	10,700
1994	9,815	7,340
1995	8,450	6,280

The low summer 93 prices (Figure 1) have pushed a lot a private farmers to give up their activities. This trend was reinforced by the bankrupt of some slaughtering plants. As a consequence, the Hungarian rabbit production shrank (Table 4). Currently, the Export amount is about 8,500 tons per year. A light increase of this Export is planned by the main slaughtering plants and this one will probably reach 10,000 tons about in 97 - 98. Besides these Exports, 5 - 10 % of the slaughtered

rabbits are sold on the domestic Market, either to satisfy the new small high quality meat requirement or because some poor quality rabbits cannot be exported and are processed for manufacturing industrial food or even pet foods. Besides, a small self consumption by the producers is still existing as previously mentioned (COLIN et LEBAS 1995). Consequently, the total Hungarian Rabbit Meat Production can be globally valued at 12,000 tons per year, value much lower than the previous estimation of the literature.

Figure 1 : Evolution of the prices during the last 5 years



COLLECTING AND SLAUGHTERING

The main part of the rabbits are collected by private collectors. The involvement of the coops in this activity is now completely finished. A strong concentration took place and the number of private collectors can be today valued at :

- ◊ 30 collectors collecting more than 3,000 rabbits per week
- ◊ 20 collectors collecting between 500 and 3,000 rabbits per week.

A strong concentration happened among the slaughtering plants too (Table 5)

- ◊ Two slaughtering plants (Környe) went bankrupted and gave up their activities.
- ◊ Two slaughtering plants (among the remaining 6 ones) represent 55 % of the slaughtered rabbits.
- ◊ Each one of the 4 others slaughter between 3 and 11 % of the Hungarian rabbits.
- ◊ The biggest slaughtering plants and some middle ones have invested a lot, particularly to build special rooms and equipment for meat cutting and processing

Table 5 : Situation of the slaughtering plants

Location	Ownership (1)	Capacity Rabbits/year	Production (Rab/year)		Export Destination
			1992	1995	
Kisvarda	H	2 000 000	1 200 000	400 000	• Italy: 70% • Germany: 30 %
Gyomenaendröd	I	2 000 000	1 000 000	300 000	• Italy: 100 %
Jászberény	H	1 000 000	200 000	700 000	• Italy: 100 %
Baja	I	3 000 000	3 000 000	1 800 000	• Italy: 80 % • Germany: 20 %
Lajosmisze	S	2 000 000	2 000 000	1 660 000	• Switzerland: 95% • Others: 5 %
Baj	H	2 000 000	2 000 000	700 000	• Italy: 60 % • Others: 40%
Környe (2)	H	4 000 000	3 000 000	510 000	• Italy: 50 % • Others: 50%
Káptalanfa	H	1 500 000	750 000	190 000	• Italy: 50 % • Others: 50%
TOTAL		17 500 000	13 150 000	6 260 000	

(1): H: Hungarian - I : Italian - S: Swiss ; (2): Closed from the End of 1995

DOMESTIC CONSUMPTION

Practically, all the rabbit meat production continues to be exported and the domestic consumption remains very low. Nevertheless, it is now possible to find and to buy rabbit meat in the market in Budapest (we have personally observed 3 shops doing it). Its quite high prices means a top positioning and reserves its consumption to few customers. Even, if still non significant in term of quantity, this evolution means a big change in the consumption habit of Hungarian people.

IMPORT - EXPORT

Table 6 : Distribution of the Hungarian Rabbit Meat Export

COUNTRY	1990 (%)	1992 (%)	1994 (%)
ITALY	92,10	84,30	68,00
GERMANY	1,05	3,50	3,50
FRANCE	0,52	2,00	2,00
SWITZERLAND	2,49	8,50	25,00
ENGLAND	0,61	0,50	0,30
THE NETHERLANDS	0,49	1,00	1,00
SPAIN	0,00	0,20	0,20
BELGIUM	2,74	0,00	0,00
TOTAL	100,00	100,00	100,00

Hungary keeps on being a rabbit meat export country. More than 90 % of the Hungarian rabbits are sold in Italy and Switzerland (Table 5), in direct relationships with the ownership of the 2 main Hungarian slaughtering plants (one by a Swiss company, the other one by an Italian one). The Hungarian Rabbit Meat Export to the other countries is much lower, even if a part of the rabbits exported to Switzerland are re-exported to Germany

or to Belgium. The export in France, relatively strong at the end of the 80's is now completely finished. Even if Italy remains the first customer for the Hungarian rabbits, its importance has drastically decreased. The Hungary is the first supplier of Switzerland and has overtaken France which was the traditional supplier of this country. Globally, the Hungarian Rabbit Meat amounts have been divided by 2 in 5 years and this country is now only the second Export Country in the World behind Chine (COLIN et LEBAS 1996).

Table 7 : Origin of the Swiss import of Rabbit Meat

ORIGIN COUNTRY	QUANTITY (TONS/YEAR)
Hungary	1850
France	816
Others	454

If Hungary is a Rabbit Meat Export Country, it imports some live rabbits from its neighbors, mainly Rumania, Slovachia and Ukraine. The Slovakian and Ukrainian rabbits come mainly from traditional small farms. The Rumanian rabbits are produced in some big farms created in this country at the beginning of the 80's (COLIN et LEBAS 1995) and of which some still existing particularly in the Sibiu area.

ORGANIZATION OF THE RABBIT MEAT INDUSTRY

In August 1995, the Hungarian Rabbit Product Council was found in order to integrate the interest of breeders, slaughtering plants, rabbits collectors. This Association is supposed to take over the task of old coops and State farms and helps to represent all the Rabbit Industry at the Ministry of Agriculture.

CONCLUSION

In the last 3 years, Hungarian Rabbit production appears to be in complete transformation. Even if the main part of the Production still comes from a lot of small farmers, some middle and big private farms are developing using West-European Technologies. Simultaneously, the big State or Coop farms have been sold to private farmers or have stopped their activity. Slaughtering and Rabbit collecting appear to be more and more concentrated between few companies and Hungary is now exporting a part of its Rabbit Meat as processed product... Indeed, Hungarian Rabbit Production appears to be in a transitory period, comparable to France or Italy during the 70's (HENAFF et LEBAS 1979) and characterized by the substitution of a Traditional Rabbit Production by a Rational and intensive one. In the same way, the Hungarian Rabbit Meat Export has decrease of 50 % about . Simultaneously, its destination has been reoriented: the French import has practically stopped while Switzerland is importing more and more important amounts. As last point, a small Domestic Consumption is developing changing a little bit the traditional characteristic of the Hungarian Rabbit Meat Production: Big producer, no consumer.

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La production du lapin en Hongrie : tendances récentes - Bien que la Cuniculture hongroise ait déjà été décrite dans plusieurs publications antérieures, son évolution récente nécessitait une actualisation de son étude. Le phénomène le plus remarquable est la cessation d'activité des grandes fermes coopératives ou d'état et leur substitution par des élevages privés utilisant des méthodes venant d'Europe occidentale. Néanmoins plus de 90 % de la production continue à provenir d'environ 20 000 petits élevages fermiers. A la suite de la crise des prix de l'été 93, la production hongroise de viande de lapin a diminué et peut globalement être évaluée à 12 000 tonnes/an. De même, les exportations hongroises de viande de lapin ont chuté avec une diminution des importations italiennes et une augmentation des importations suisses. Par ailleurs, les activités de ramassage et d'abattage des lapins sont de plus en plus concentrées entre quelques sociétés tandis que la Hongrie exporte désormais une partie de sa viande de lapin sous forme de produits élaborés. Enfin, une petite consommation nationale est apparue au cours de ces dernières années.
