

## TRADE BALANCE OF HUNGARIAN RABBIT MEAT

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### ABSTRACT

In 2009, Hungary was at the 14<sup>th</sup> place ranking among rabbit meat producing countries (5,400 tons). However, since domestic rabbit meat consumption was low (3-4%), and 96-97% of the slaughtered rabbits were sold to international markets, it claimed the 4<sup>th</sup> place when only the rabbit meat trade was concerned. No data are available about self-consumption levels. According to the database of FAOSTAT, the main present challengers are China, France, and Belgium. Hungarian rabbit meat was exported mainly to Italy (46.3%), Germany (20.3%) and Switzerland (18.8%), while the Russian Federation and the Netherlands significantly increased their import demands. Although Italy increased its imports in total, the share of Hungarian rabbit meat declined (from 75.7 to 55.4% between 2005 and 2009). In contrast, Germany demands far less foreign rabbit meat, but the imports from Hungary have steadily increased (17.8%). The Swiss imports were also shrinking, but the share of Hungarian rabbit meat remains at approximately 50%. Besides stimulating national consumption, Hungarian rabbit meat production and trade could be facilitated by retaining the position in existing markets, also by expanding the exports to those countries where further potential can be exploited due to increased demand. Small-scale rabbit production almost ceased in Hungary and was only 1-2% of the total purchased quantity. The contribution or share of Hycole, Pannon White, Debreceni White, Hyla and Zika were 60.9, 30.5, 4.5, 2.8 and 1.3%, respectively. According to the demands of foreign markets, rabbit cages with platforms were established in large numbers, where the kits can be reared at their place of birth. In conclusion, although the promotion of high quality Hungarian rabbit meat is no longer enough to captivate new target markets; innovative approaches are needed in marketing, while reliability and better satisfaction of consumers' demands should be also emphasized.

**Key words:** Rabbit meat, Hungary, production, trade balance, export, import

### INTRODUCTION

Today, world rabbit meat production has more than quadrupled since 1961. China and Italy dominate the market; together they are responsible for more than half of world production. Since decade and a half ago, China has been the leader, not only in terms of production, but the volume of exports as well. Although Hungary is at the 14<sup>th</sup> place among major rabbit meat producing countries, it is responsible for only 0.3% of the world production, but it plays an important role in terms of foreign trade. Since 96-97% of the slaughtered rabbits are sold to international markets (Juráskó, 2011), Hungary is one of the greatest rabbit meat exporter (Szendró, 2004). As a consequence of the export situation, international markets have a considerable influence on Hungarian production levels and prices. For this reason the Hungarian rabbit meat production and trade balance are examined in the aspect of the world market. The objective of this paper is to present import and export figures for the world rabbit meat trade.

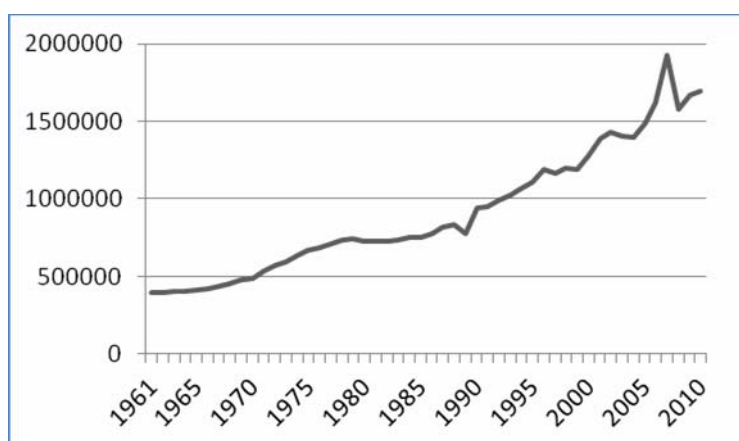
### MATERIALS AND METHODS

All of the data (production, trade balance) were collected from the database of FAOSTAT (<http://faostat.fao.org>). Data downloaded from different databases did not always correspond and sometimes data were available only up to 2009 but sometimes up to 2010. Consequently, the database between 1990 and 2009 of <http://faostat.fao.org/site/537/default.aspx> was used for trade (export and

import) data, while that of <http://faostat.fao.org/site/569/DesktopDefault.aspx?PageID=569#ancor> was used for production data collection. In tables, countries are ranked on the basis of data of 2009.

## RESULTS AND DISCUSSION

Figure 1 shows the changes in world rabbit meat production between 1962 and 2010. The highest improvement can be seen in the case of China (Table 1). It produced about 670,000 tons of rabbit meat in 2010 out of the world's production of 1.7 million tons. Italy was the leader in production until 1993; however, since China took the lead, it has claimed the second place position, being less than 40% of Chinese production. In traditional rabbit meat producer and consumer countries (France and Spain), a significant reduction in production was experienced. Despite the fact that production fell to 30% in 2010 compared to 1990, Hungary is still in the top 15 place of the world market.



**Figure 1:** World rabbit meat production (tons) between 1961 and 2010

Source: <http://faostat.fao.org/site/569/DesktopDefault.aspx?PageID=569#ancor>

Besides being by far the greatest producer, China is the most important player in terms of rabbit meat export (Table 2). One of its utmost strengths is its low prices. Due to the large distance, China exports only frozen meat to Europe, and since many countries prefer chilled meat, this could be the exporters' strength or opportunity in the region compared to China, as well as Argentina. On the other hand, most of the European consumers are conscious in terms of high quality standards and animal welfare, which may not be the mainstay of export leading countries outside of the European Union.

**Table 1:** Rabbit production (tons) of the leader countries and their share from world production

Countries	1990	1995	2000	2005	2010	% in 2010
World	939,561	1,108,679	1,285,381	1,485,145	1,692,962	100,0
China	96,000	268,000	370,000	510,600	669,000	39,5
Italy	184,000	209,800	212,416	225,000	255,400	15,1
Egypt	49,680	62,400	69,600	69,840	69,840	4,1
Spain	71,230	110,882	103,596	70,524	66,200	3,9
France	93,016	91,199	84,600	53,222	51,665	3,1
Czech Republic	-	33,534	38,500	40,848	37,800	2,2
Germany	38,749	36,037	33,800	32,772	37,500	2,2
Russian Federation	-	11,200	6,500	8,475	13,500	0,8
Ukraine	-	19,400	13,900	13,457	13,500	0,8
Bulgaria	2,578	5,015	6,735	6,000	8,300	0,5
Greece	4,990	8,200	8,300	7,930	7,400	0,4
Argentina	7,040	7,040	7,150	7,150	7,260	0,4
Algeria	7,000	7,000	7,000	7,000	7,000	0,4
Hungary	17,200	11,380	14,000	9,710	5,404	0,3

Source: <http://faostat.fao.org/site/569/DesktopDefault.aspx?PageID=569#ancor>

**Table 2:** The leader countries in rabbit meat export (tons) and their distribution (%) of world export

Countries	1990	1995	2000	2005	2009	% in 2009
China	17,627	20,244	22,554	8,925	10,374	29.5
France	4,531	4,340	5,823	5,048	5977	17.0
Belgium	?	?	2,330	2,649	5046	14.4
Hungary	17,302	8,364	5,199	5,331	4718	13.4
Argentina	4,388	5,533	3,410	6,093	2524	7.2
Spain	195	2,018	4,373	4,182	2127	6.1
Italy	153	786	2,042	3,141	1722	4.9
Netherlands	1,570	3,422	8,716	1,149	1023	2.9

Source: <http://faostat.fao.org/site/537/default.aspx>

Out of the 8 leading countries of the world, only China, France and Belgium (the top 3) were able to increase their rabbit meat exports in the last five years. These countries together with Hungary are responsible for 75% of the total exported rabbit meat share (35,157 tons). Although Hungary lost its key position since 2005, its share in world exports is still twice as high as Argentina's, the next ranking country. Hence, concerning foreign trade, Hungary is still a major player. It is unique that 96-97% of the slaughtered rabbits are sold in international markets (Szendrő, 2004), since domestic rabbit meat consumption is only 3-4% of the total production sold in Hungary (Juráskó, 2011). The main exporters are in competition for the same market share. Therefore, it is essential to know how to obtain a larger competitive advantage. As a first step, data on our actual and potential markets should be carefully analyzed.

Italy has always been the most important market for Hungary (Table 3). Although, it still represents almost half of the total amount of exported rabbit meat, a significant decline was experienced in terms of volume (decrease from 15,422 to 2,184 tons between 1990 and 2009), due to increased production in Italy. Germany is the only country which has continuously increased its demand for Hungarian rabbit meat; it solely imports 958 tons (20.3% in 2010). The most animal welfare-aware, Swiss market has become deterrent since completing a Swiss-owned slaughterhouse. The share of other countries varies; however, the importance of the Russian Federation is clearly on the rise.

Hungary's rabbit meat export markets are among the greatest importers (Szendrő and Szendrő, 2008). In 2009, Italy ranked in fourth place, Germany was at the third rank position (former it was the first), while Switzerland was at the fifth place (Table 4). As the Russian Federation significantly increased its demand, it became a dominant country in rabbit meat imports by claiming second place. This trend has been experienced in Hungary, as well, since the Russian Federation became our fourth most important market. Further potential can be exploited in Belgium, now leading in rabbit meat imports.

**Table 3:** Hungarian rabbit meat export (fresh, chilled or frozen) and its distribution (%)

	1990	1995	2000	2005	2009
<b>Total export (tons)</b>	<b>16,763</b>	<b>8,363</b>	<b>5,199</b>	<b>5,331</b>	<b>4,718</b>
Italy	92.0	73.1	56.8	42.2	46.3
Germany	2.1	3.6	8.3	19.6	20.3
Switzerland	4.3	18.7	30.9	26.0	18.8
Russian Federation	-	-	0.5	2.1	4.0
Netherlands	-	-	-	0.3	3.2
France	0.7	1.1	0.8	2.6	2.3
Others	0.9	3.5	2.7	7.2	5.1

Source: <http://faostat.fao.org/site/537/default.aspx>

Despite the decreasing ratio, more than half of Italian imports still come from Hungary (Table 5). Since Italy is not only less dependent on imports, but also exported 1722 tons in 2009, it became our major regional competitor, rather than a potential market where our exports could be increased. On the other hand, France continuously enhanced its position, which means that the share of French rabbits in Italian import is one-third. Spain remains another important import source for Italians, while the rest of the countries are negligible in terms of imports.

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

Countries	1990	1995	2000	2005	2009
Belgium	n.a.	n.a.	2,745	3,694	5,006
Russian Federation	-	-	31	4,017	4,603
Germany	3,301	8,213	6,423	6,141	4,400
Italy	17,681	7,535	3,986	2,887	3,789
Switzerland	4,095	3,363	3,179	2,636	1,880
Portugal	330	464	2,232	1,065	1,867
France	12,280	7,476	8,070	3,502	1,844
Netherlands	1,159	5,124	11,022	2,224	1,149

Source: <http://faostat.fao.org/site/537/default.aspx>

The share of Hungarian rabbits involved in Swiss imports was just below 50% in 2009 (Table 6). Germany and Italy represent the next highest proportion (14 and 12.3%, respectively), while the Netherlands and Spain increased their importance (9.6 and 7.9%, respectively). On the other hand, the imports from France, which used to be the most important source for Switzerland, has continuously decline. Data clearly show the importance of neighboring countries, as well as the factor of animal welfare requirements, which explains the strengthening position of the Netherlands. This aspect is also considered by Hungarians.

The competition was quite intense in Germany in 2005, but on the basis of the data, China became the winner (35%) by 2009, while the French, Hungarian and Italian exports were 19.1, 17.8, and 14.4%, respectively (Table 7). The decline in imports from neighboring Poland is obvious. In contrast, Hungarian rabbit meat exports to Germany (and also its share) have continuously risen. Further improvements could be realized by higher quality, reliability, and better satisfaction of consumers' demands (Szendrő and Szendrő, 2008).

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

	1990	1995	2000	2005	2009
<b>Total import (tons)</b>	<b>17,681</b>	<b>7,535</b>	<b>3,986</b>	<b>2,887</b>	<b>3,788</b>
Hungary	84.3	80.5	72.1	75.7	55.4
France	1.4	3.4	14.0	6.2	29.1
Spain	-	-	8.5	3.8	12.1
Germany	-	-	0.1	0.5	1.2
China	2.1	6.7	2.3	-	0.5
Croatia	-	2.4	-	12.1	-
Czech Republic	-	4.6	2.6	-	-
Others	12.2	2.4	0.5	2.2	2.9

Source: <http://faostat.fao.org/site/537/default.aspx>

**Table 6:** Swiss rabbit meat import (fresh, chilled or frozen) and its distribution (%)

	1990	1995	2000	2005	2009
<b>Total import (tons)</b>	<b>4,095</b>	<b>3,363</b>	<b>3,179</b>	<b>2,636</b>	<b>1,880</b>
Hungary	7.5	54.9	51.1	52.2	47.6
Germany	31.9	0.1	0.1	18.5	14.0
Italy	3.5	7.2	11.0	8.6	12.3
Netherlands	3.9	0.8	0.1	0.3	9.6
France	34.9	23.7	23.0	16.2	7.9
Spain	-	-	-	-	5.6
Argentina	2.6	3.3	2.0	3.4	1.5
China	2.4	4.4	12.1	-	0.1
Others	13.3*	5.6	0.5	0.8	1.4

Source: <http://faostat.fao.org/site/537/default.aspx>

\*Poland: 10.7%.

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

	1991	1995	2000	2005	2009
<b>Total import (tons)</b>	<b>5,283</b>	<b>8,213</b>	<b>6,423</b>	<b>6,141</b>	<b>4,400</b>
China	19.0	40.2	30.5	16.9	35.0
France	14.3	14.4	23.3	16.1	19.1
Hungary	8.9	2.7	5.6	16.7	17.8
Italy	1.1	0.8	4.8	13.4	14.4
Czech Republic	-	18.5	9.0	5.9	6.3
Belgium	-	-	0.5	1.8	3.4
Netherlands	19.2	11.4	20.9	3.5	2.6
Poland	34.1	11.3	4.8	11.6	0.7
Others	3.4	0.7	0.6	14.1*	0.7

Source: <http://faostat.fao.org/site/537/default.aspx>

\*Bulgaria: 6.1%; Argentina: 3.1%

In order to satisfy markets with the highest quality needs, Hungarian producers raise mostly one of the best meat producing breeds, while also considering animal welfare of great importance. In 2010, the contribution of Hycole, Pannon White, Debreceni White, Hyla, and Zika were 60.9, 30.5, 4.5, 2.8, and 1.3%, respectively. Rabbit cages with platforms were established in large numbers, where the kits can be reared at their place of birth. At some farms, growing rabbits are housed on deep litter.

## CONCLUSIONS

As China takes the lead and further advances its influence on the rabbit meat market, other countries are in higher competition to increase their share to satisfy world demand. Since, unlike the world trend, rabbit meat production is continuously decreasing in Hungary and rabbit meat imports in some of its most important markets is shrinking. The primary aim would be to retain our position. Nevertheless, it would be very important to obtain new markets to support the facilitation of Hungarian rabbit meat production and trade. Hungarian exports to its main importers, such as Belgium, the Russian Federation, and Germany could be further improved. Some of these countries would be new markets. However, high quality Hungarian rabbit meat is no longer enough to captivate new target markets; innovative approaches are needed in marketing, while reliability and better satisfaction of consumers' demands should be also emphasized.

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