

APPENDIX

BROILER PRODUCTION IN MACEDONIA

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Introduction

Macedonian poultry industry satisfies the domestic egg market needs, but at the same time Macedonia is importer of a poultry meat. The level of meat production of our poultry industry is presented in Table 1. (MAFWE, 2007; FAOSTAT, 2012). In addition, the half of the mentioned production of poultry meat (broiler meat) is attributed to a spent layers meat (chicken meat).

Table 1. Quantity of poultry (chicken) meat production

Year	Total raw meat produced, tons
2010	3200
2009	3319
2008	3012
2007	3524
2006	3715
2005	3 809
2004	3 189
2003	4 116
2002	3 992
2001	4 702

Total, yearly poultry meat consumption in Macedonia is 23 – 30.000 tones, or 11.5 - 14.5 kg/per capita (according National Statistic Office data, the 2005 annual consumption of poultry meat per capita was 11.0 kg suggesting a market needs of 22.000 t/year, while the Veterinary Directorate reports import of 24.093 t, which is close to the poultry meat imports of FAO (Table 2).

Table 2. Production and import of poultry meat in the R. Macedonia

(1000 tons)	Macedonia							
FAOSTAT FAO Statistics Division September 2012	2003	2004	2005	2006	2007	2008	2009	2010
Production	4.12	3.19	3.81	3.71	3.52	3.01	3.32	3.20
Import	20.74	25.74	21.49	19.69	30.84	25.41	28.78	25.99

The EU information (EUROSTAT) about the chicken meat consumption in European Union and projections for the poultry meat market movement and chicken meat consumption per capita suggest that Macedonia, considering the poultry meat consumption, is backward behind states members of EU (Table 3.)

Table 3. Consumption data for poultry meat in R. Macedonia and EU, 2003-2012 (kg/head) (FAOSTAT)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
EU-25	22.9	22.9	23.6	23.6	23.8	23.9	23.2	23.1	22.6	22.8
R. Macedonia	13.5	15.8	13.9	13.2	19.40	16.00	17.30	17.00	16.90	17.10

Materials and methods

Data from different relevant sources were collected as a reference for broiler production and poultry meat consumption trends in R. Macedonia. Questionnaire research survey on consumer preferences of poultry meat focused on chilled broiler meat marketing development idea, including 1000 examinees, revealed that the most of the questioned consumers purchased poultry meat more than three times a month.

Results and discussion

Only 20.8% buy chilled poultry meat regularly, beside the fact that 83.5 % recognize chilled and frozen poultry meat as different product. Only 45.4% of the questioned consumers (about a half) preferred to buy the most valuable and highly priced meat parts of first class meat (breast, drumstick and thighs). The majority of consumers 89.2% accept higher prices for better quality articulated to price/quality relations. Quality is dominant factor and crucial moment in buying decision 67%, followed by healthy 59.4%, but due to its relativity price is still a factor that affects the decision due to the low buying power. If the trend of the Macedonian market follows the consumption and quality demand of the new EU member states, (where fresh (chilled) poultry meat will supersede the most of the market), fresh (chilled)

poultry meat will increase the domestic market needs, following the needs of our consumers for fresh chilled chicken meat (whole chicken, breast, drumstick and thighs). This trend is occurring beside the higher price of products of fresh (chilled) poultry meat. Fresh poultry (chilled) = 115 - 169 denar/kg - 1.9 EUR - 2.8 EUR, frozen chicken meat= 90-120 denar/kg-1.46 EUR - 2.1 EUR. Based on the data from 2005, predictions can be made on the growth of the poultry meat market in the next years in order to know the situation after 5, 10 and 20 years. Considering the basic assumptions from the Table 4, than the given figure will present the market growth potentials and a part of the domestic production and potentials for increasing the broiler industry in the next 20 years.

Table 4. Poultry sales past and predicted future

	2005: data	2010: data	2015: forecast
Number of inhabitants	2.0 million people	2,1 million people	2.2 million people
Total poultry meat consumption	25.300 tonnes	29.190 tonnes	33.000 tonnes
Poultry meat consumption per capita	12.66kg/capita	13.90kg/capita	15.0kg/capita
Total poultry meat supply:			
- Meat from a spent layers	1.810	1.000	1.000
- Fresh broiler meat	2.000	2.200	7.000
- Import	21.490	25.990	25.000

Conclusions

Considering these predictions and projections according to development state policies designed in national and **IPARD** program, followed by the program for financial support in the agriculture (30MKD - 0.47Euro/broiler for 2011), it is probable to expect growth and development of broiler industry in the next period. If current level of production is about 2.200 tones/year covering the market demands with approximately 7%, as soon as production starts to increase, the level of about 25% should be reach in 5 years and about 30% in 10 years.

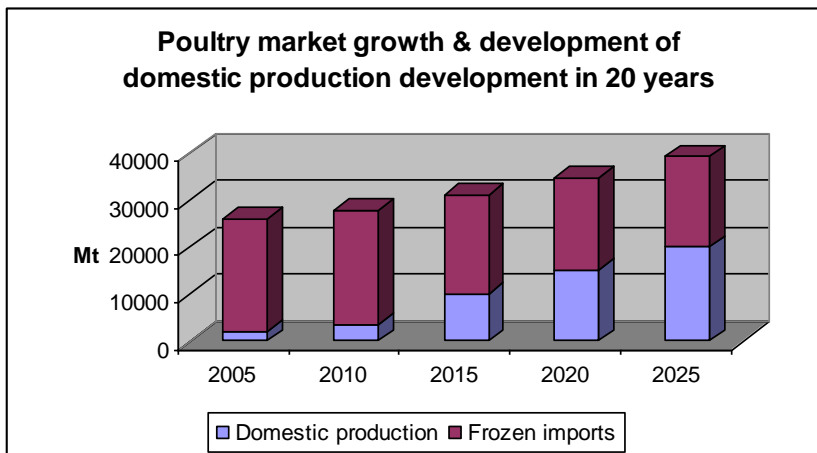


Figure 1. Predicted market growth and development of broiler production

Following expected trends presented on the above table and figure of prediction, it could be expected that the part of the frozen poultry meat in total offer will decrease (from 87% to 63% (2015) and 46.7% (2025),) as the fresh chilled poultry meat from domestic production increase its part on the market supply (from 7% to 30% and 48.4%, respectively).

Generally, according to the analysis presented above, there is a conclusion that there are possibilities for broiler production, focusing on the domestic market for fresh (chilled) poultry meat.

Experts production forecast of Broiler Meat

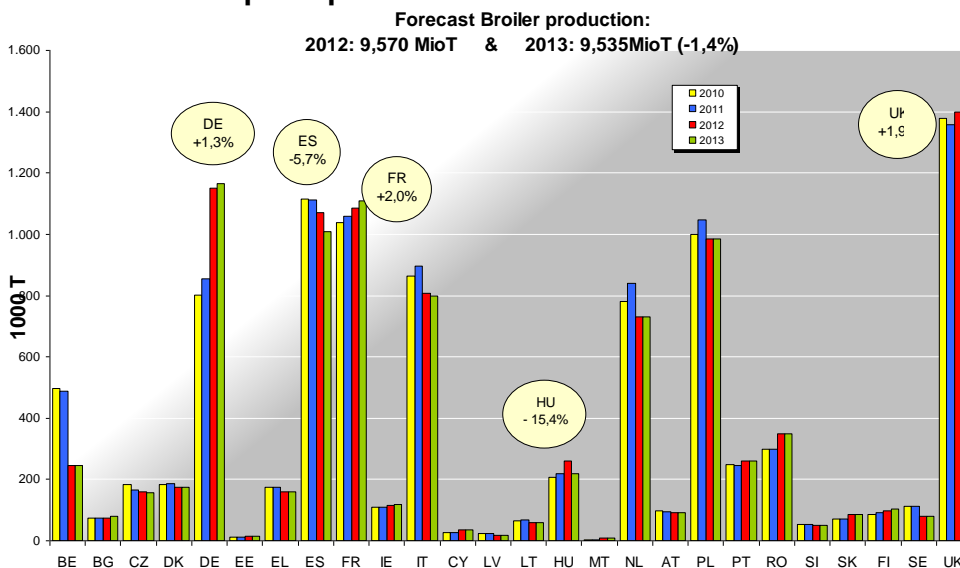


Figure 2. Predicted production forecast of broiler production in EU in 2013 (CIRCA).

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БРОЈЛЕРСКО ПРОИЗВОДСТВО ВО МАКЕДОНИЈА

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Апстракт

Македонската бројлерска индустрија е недоволно развиена па затоа поголемиот дел (преку 90%) од живинското месо присутно на пазарот доаѓа од увоз на замрзнато живинско месо. Иницијални чекори за развој на бројлерскиот сектор се реализирани со фокус на развој на пазарот на свежо оладено живинско месо. Анализата на пазарот открива дека постојат можности за развој на секторот а трендовите на домашниот пазар ги следат трендовите на меѓународниот пазар. Проекции базирани на овие трендови, а следејќи ги понудата и побарувачката, укажуваат на можност за раст на пазарот и свртување кон зголемување на уделот на свежото, оладено живинско месо и производи од него на штета на смрзнатото во следните десет до петнаесет години. Врз основа на информациите за домашното производство и податоците за увозот, може да се заклучи дека се потребни активности во сите аспекти на ланецот на понудата почнувајќи од одгледувањето бројлери, колењето, натамошното сечење на делови па се до дистрибуцијата и продажбата на свежото оладено и смрзнато живинско месо. Штом основните елементи на добро организирана понуда на оладено бројлерско месо се естаблира се отвораат додатни можности за други производи со додадена вредност, како што се пилешките колбаси, пилешките плескавици и парчиња (за индустријата за брза храна).

Клучни зборови: живинско месо, пазар, трендови, предвидувања.