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STRUCTURAL ANALYSIS OF DOMESTIC MEAT SUPPLY ON DEVELOPMENT REGIONS

CHETROIU RODICA¹

Abstract: *The paper contributes to market research in the agri-food sector, by analyzing the structure of domestic meat supply from slaughtering, by species (cattle, pigs, sheep, goats, poultry) at national level and on the eight development regions. Also, for each species presented, the study deepens the age or production categories that are the subject of the meat offer. Thus, at the country level, pigs and poultry provide the largest share of the meat supply, each representing 39% of total, cattle provide 14% of the offer, sheep 7% and goats only 1%. At species level, calves and other young cattle represent the largest part of the cattle supply (67%), and for pigs, almost all pork is provided by animals over 50 kg (99.89%). In the sheep species, lambs provide 67% from slaughtering, and in goats, kids represent 97% of the meat supply of their species. Poultry slaughterings include hens, chickens, turkeys, ducks, geese and other poultry, of which chickens provide the largest share of poultry meat supply (64.8%). At the level of development regions, the most of cattle slaughterings are done in the North-East Region, the West Region occupies the first place in pork slaughterings, the South Eastern Region has the largest sheep and goat meat offer, and the South-Muntenia Region provides the largest quantity of poultry meat.*

Keywords: *supply, meat, market, cattle, poultry*

JEL Classification: *L11, L17, O13, Q13*

INTRODUCTION

The analysis of the main elements of the market functioning mechanism is based on the studying of its two fundamental components, namely demand and supply. Thus, the present study provides a deepening of the structural analysis of the meat supply from internal slaughterings, by species (cattle, pigs, sheep, goats and poultry), and within the species by age or production categories. The analyzes confirmed that most of the meat supply in our country is equally ensured by pork and poultry, followed by cattle.

MATERIAL AND METHOD

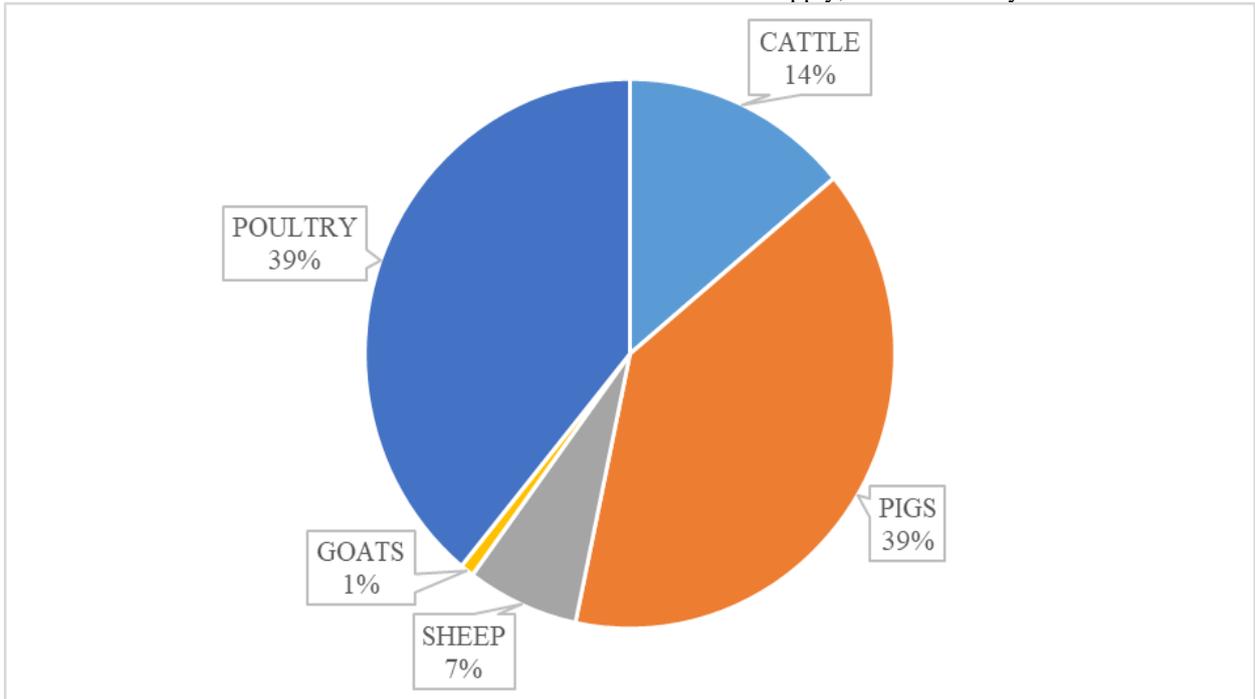
The researches in this paper are based on statistical data from the publications provided by the National Institute of Statistics NIS in 2016 on livestock and livestock production in 2015, namely the number of animals slaughtered and their live weight, by development regions, processed with Microsoft Excel.

RESULTS AND DISCUSSIONS

The results of the research show that, on the first place in the domestic meat supply, is pork, which in the year 2015 totals 562,277 tons, representing 39% of the total slaughterings at the country level. A short distance away is poultry meat, with 558,014 tonnes (about 39%), and the next place, with only 199,711 tonnes, representing 14%, is beef. Sheep participate in the meat offer of the country with only 7% of the quantity (97,671 tonnes), and the goats with only 1% (11,936 tonnes) (Chart 1).

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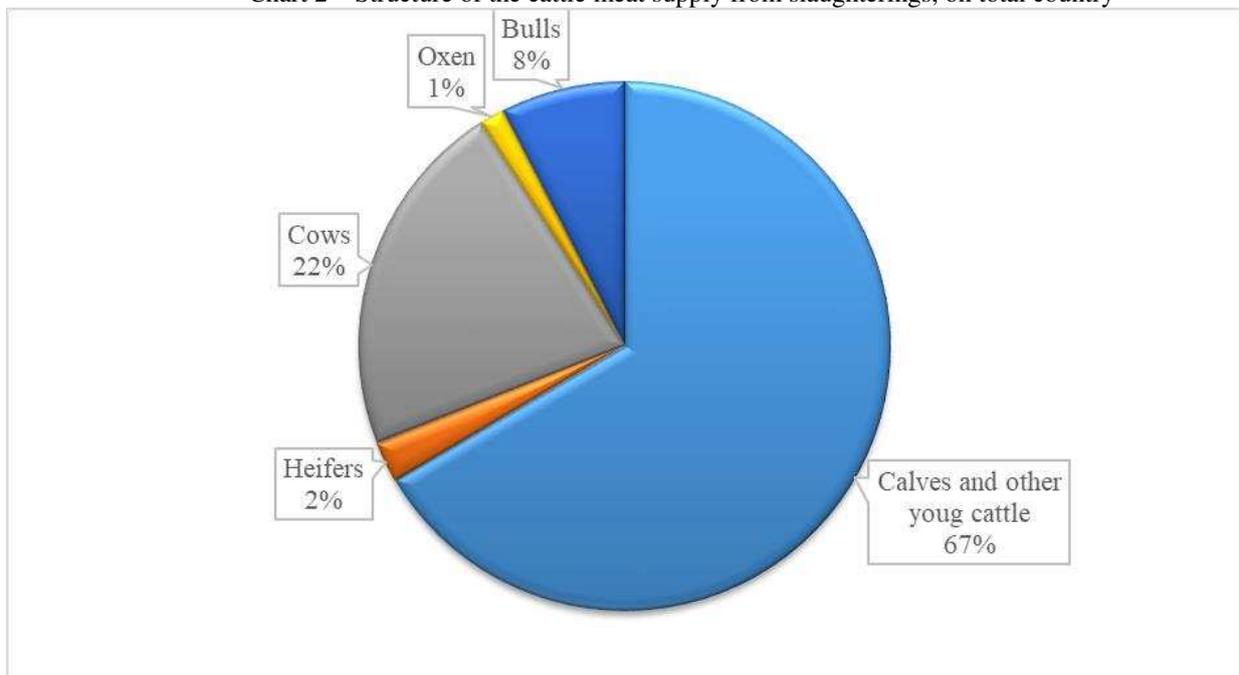
Chart 1 – Structure of domestic meat supply, on total country



Source: Own calculations following NIS data

In Chart 2, the domestic supply of beef is presented at country level, indicating that the largest quantity (67%) is represented by the category of calves and other young cattle (132,908 tons).

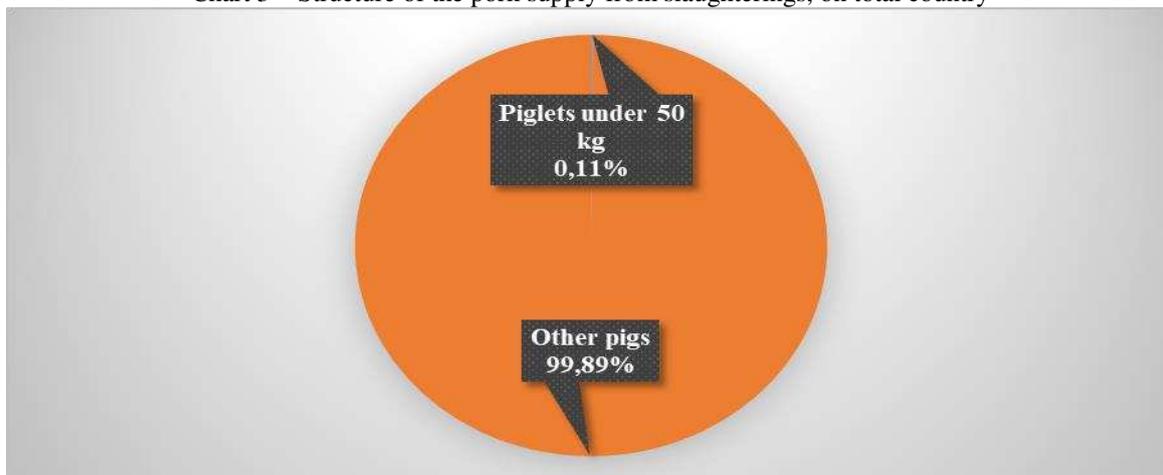
Chart 2 – Structure of the cattle meat supply from slaughterings, on total country



Source: Own calculations following NIS data

With regard to pork, statistical data indicate that slaughterings at this species are made for pigs weighing more than 50 kg almost totally (562 thousand tonnes) and only 0.11% (609 tonnes) are piglets below this weight, as illustrated in Chart 3.

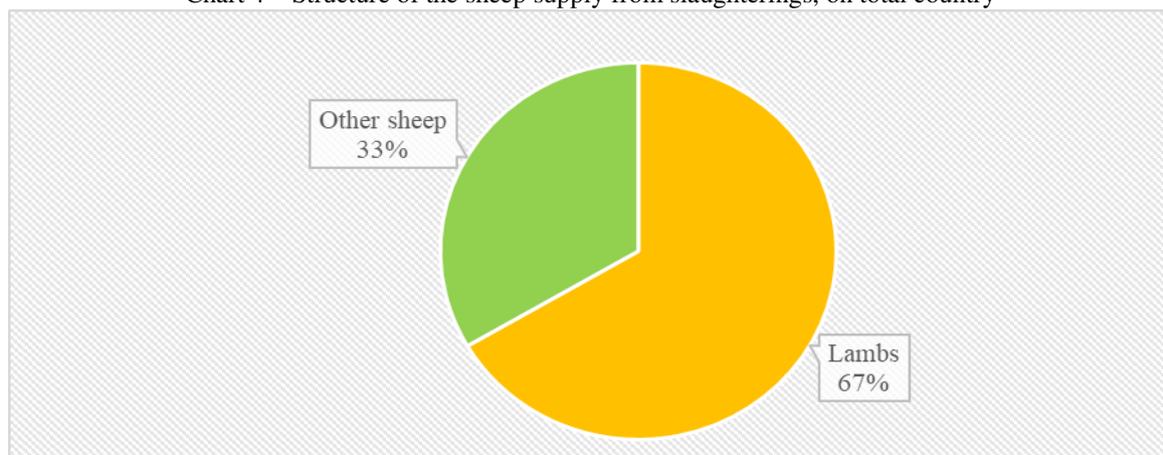
Chart 3 – Structure of the pork supply from slaughterings, on total country



Source: Own calculations following NIS data

Sheep meat from internal slaughterings has as dominant lambs (67% - 65,051 tonnes) and only 33% (32,620 tonnes) are other categories of sheep (Chart 4).

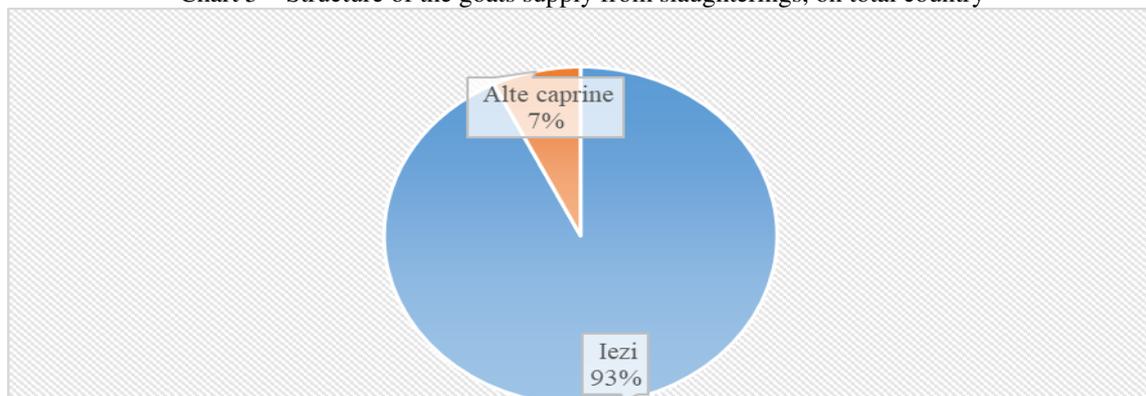
Chart 4 – Structure of the sheep supply from slaughterings, on total country



Source: Own calculations following NIS data

A similar situation is at goat meat supply, where 93% are kids slaughterings and only 7% are other categories of goats (Chart 5).

Chart 5 – Structure of the goats supply from slaughterings, on total country



Source: Own calculations following NIS data

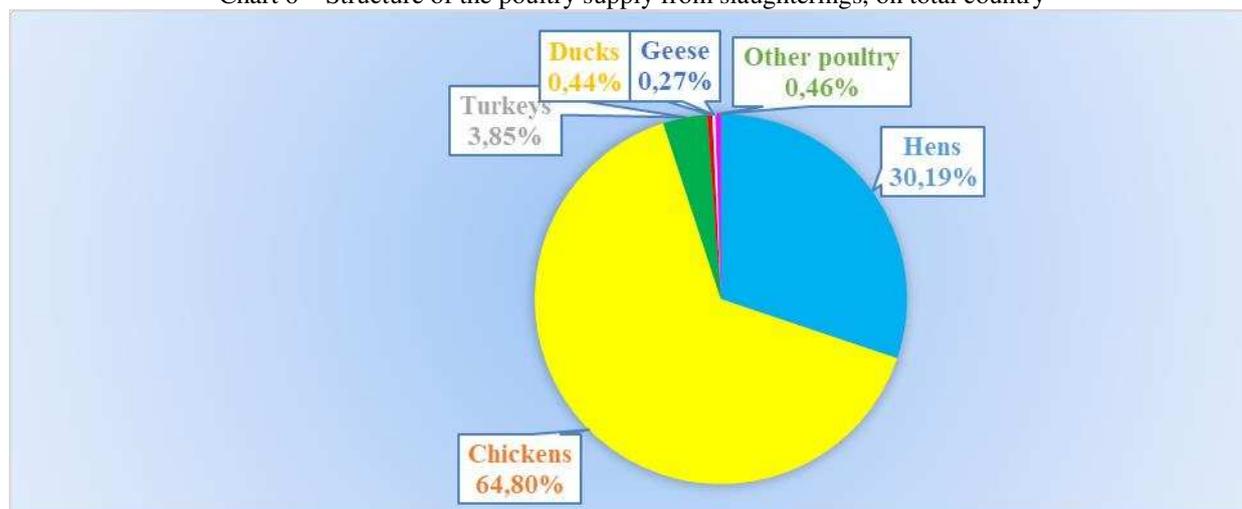
The offer of poultry meat is more diversified, including hens, chickens, turkeys, ducks, geese and other poultry, as shown in Table 1 and Chart 6.

Table 1 – Quantities of poultry meat slaughtered, on total country

Specification	Quantity (thousand tons life weight)
Hens	168.4
Chickens	361.6
Turkeys	21.5
Ducks	2.4
Geese	1.5
Other poultry	2.6
Total poultry	558.0

Source: NIS

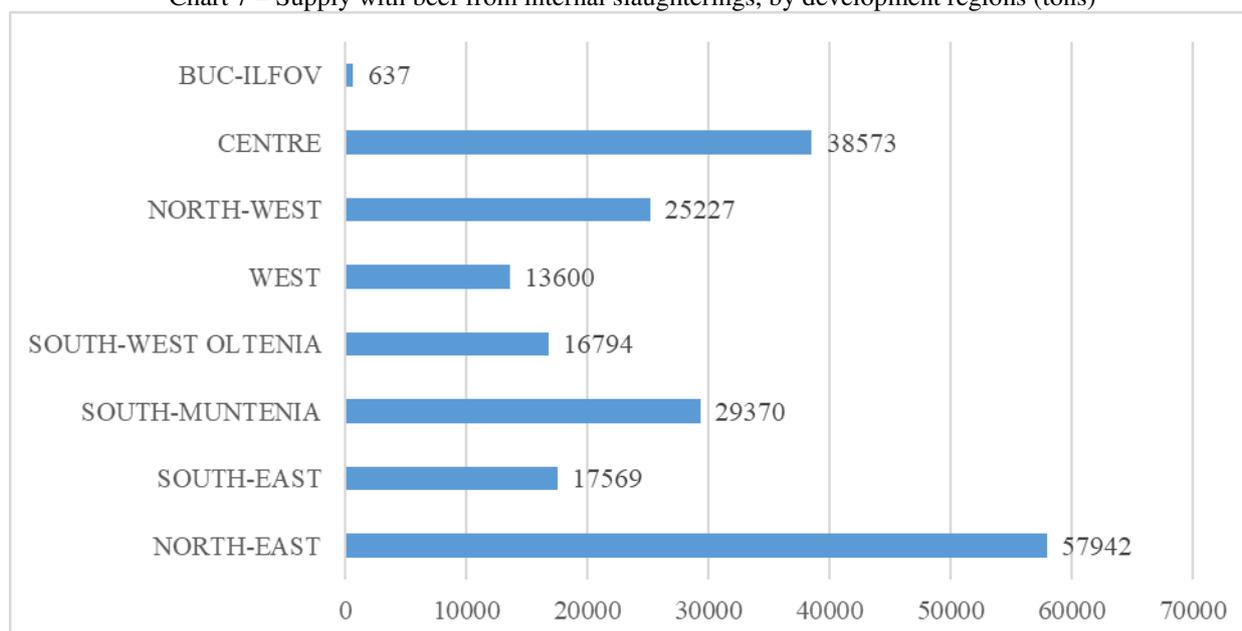
Chart 6 – Structure of the poultry supply from slaughterings, on total country



Source: Own calculations following NIS data

Distribution by development regions of domestic supply of beef, as shown in Chart 7, indicates that the North-East Region ranks first with 29% and second is the Central Region with 19,3% of the offer.

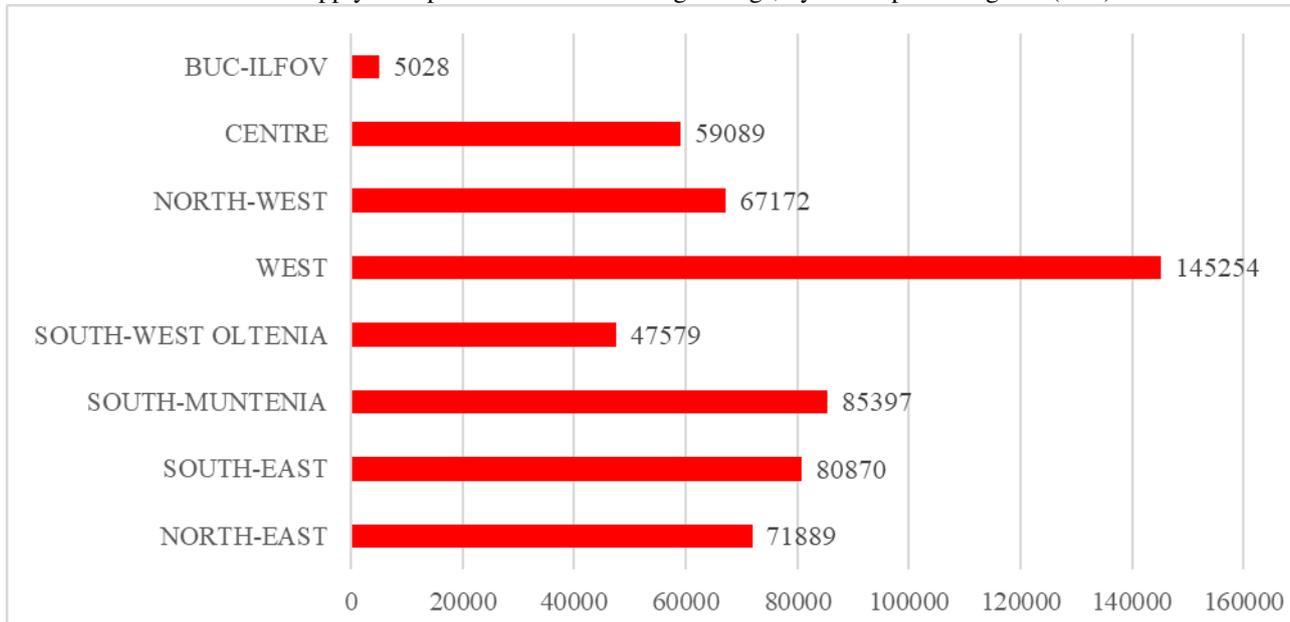
Chart 7 – Supply with beef from internal slaughterings, by development regions (tons)



Source: NIS

The largest amount of pork is offered by the West Region, which is distinct from the other regions by 25.8%, followed by the South-Muntenia Region, by 15.2%, the last being Bucharest-Ilfov Region (Chart 8).

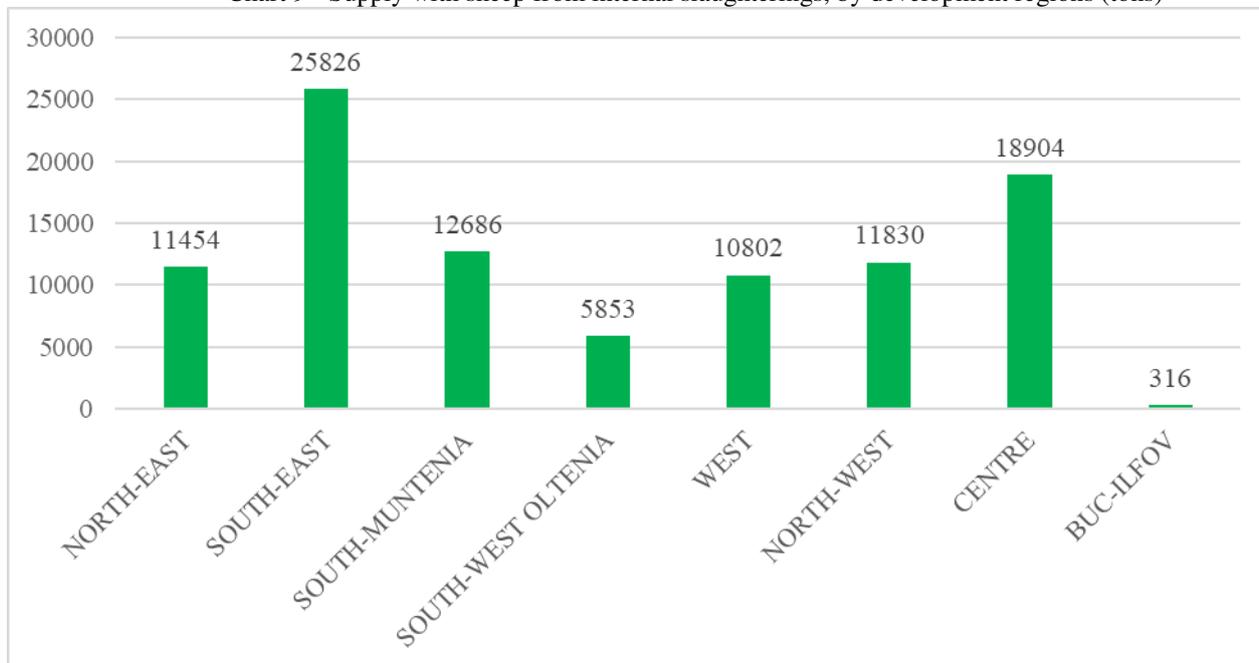
Chart 8 - Supply with pork from internal slaughtering, by development regions (tons)



Source: NIS

The sheep meat supply primarily reveals the South East Region, with 26.4% of total, followed by the Central Region, which provides 19.3% of slaughtering (see Chart 9).

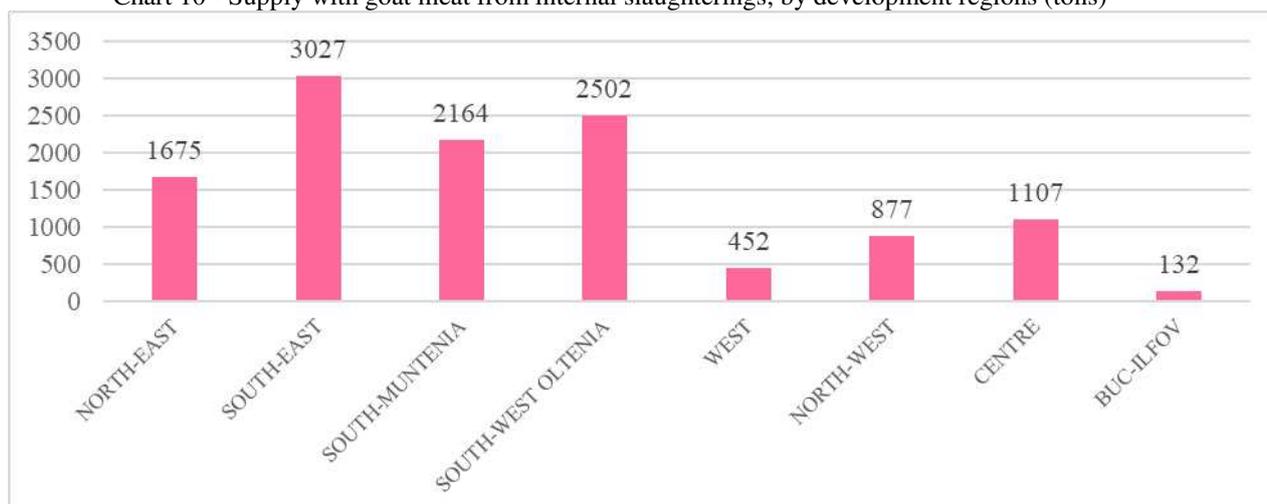
Chart 9 - Supply with sheep from internal slaughtering, by development regions (tons)



Source: NIS

The South East Region also ranks first in the goat meat slaughtering (25.4%), followed by South-West Oltenia Region, with almost 21% of the offer (see Chart 10).

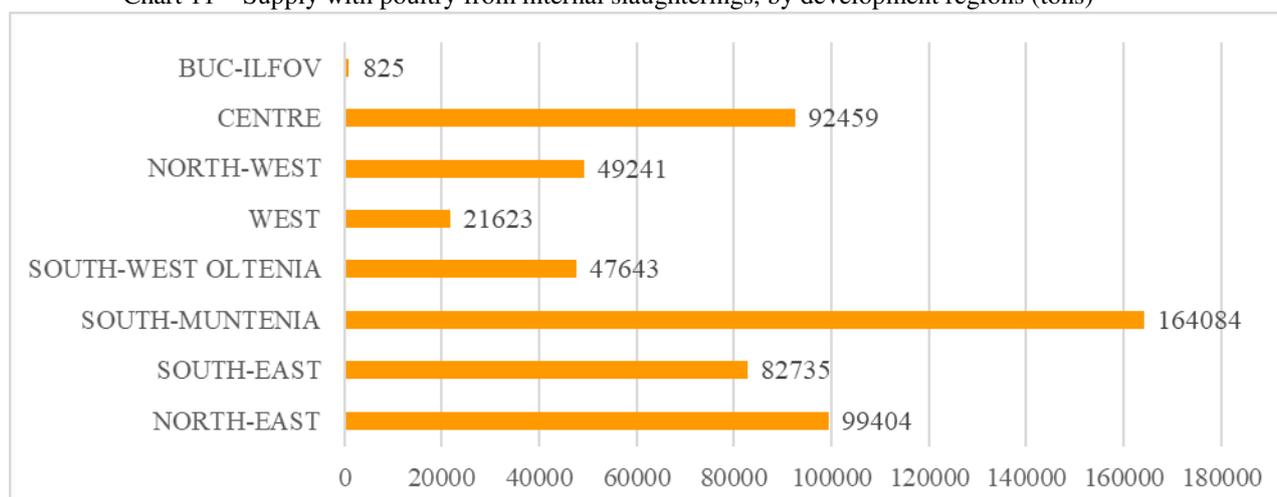
Chart 10 - Supply with goat meat from internal slaughterings, by development regions (tons)



Source: NIS

The South-Muntenia Region is clearly distinguished by poultry meat, with 29.4%, followed by the North-East Region, by 17.8% and by the Central Region, by 16.6% (see Chart 11).

Chart 11 - Supply with poultry from internal slaughterings, by development regions (tons)



Source: NIS

CONCLUSIONS

The meat supply from internal slaughterings includes a wide range of species and animal categories, distributed differently across the 8 development regions. Pork, together with poultry, accounts for 78% of the quantities, confirming the population food preferences. In sheep and goat meat, the fact that the vast majority of the slaughtered is young people also indicate the seasonality of consumption in these species. In cattle, the decline in the number of herds from recent years is also reflected in the reduced quantity of slaughtering, but the outlook is optimistic given the support measures for this species and also the fact that the cow for meat begins to permeate more and more on Romanian farms.

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