

IBERIAN DRY-CURED HAM CONSUMPTION IN SPANISH HOUSEHOLDS

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ABSTRACT

The available data for consumption of Iberian dry-cured ham in Spain (2008–2012) shows the behavior of the industry over a period ridden by the economic recession; showing higher levels of consumption between 2009 and 2012 when compared to those registered in 2008 but with a decrease in consumer spending. Specific events used as reference worth mentioning are the sharp increment in consumption in the second half of 2009, the drop at the end of 2010 and the increase in 2013 accompanied by, for the first time, increase in consumer spending. One of the most positive aspects has been the ongoing increase of consumption in non-traditional periods of the year. The period of time analyzed also outstands due to an increment of sales and purchases via more dynamic and modern channels (supermarkets and hypermarkets) in comparison to the more traditional shops and specialized stores.

Key words: Iberian / dry-cured ham / consumption / Spain

1 INTRODUCTION

Dry-cured ham is by far the most important and characteristic product in Spain when it comes to meat products produced from the Iberian swine. Social and economic changes are affecting its consumption and how it is marketed. Over the last few years in Spain, the Ministries in charge of food and agriculture have financed with the money coming from the general budgets the Households panel, which is basically a group of consumers who are required to provide monthly information on their consumption and spending of a large variety of food products. The information received thanks to the survey is ample in scope as it makes it possible to learn the amounts purchased and the locations where they were bought (supermarkets, traditional shops, etc.), the regions (autonomous regions) and even the purchases made based on social strata, number of population, family structures, etc. The aim of this study is to analyze the consumption of Iberian dry-cured ham in Spain, its evolution under the quantitative and economic aspects at hand.

2 MATERIAL AND METHODS

The information obtained from the Households panel, designed by the Spanish Ministry of Agriculture, Food and Environment (MAGRAMA, 2013), has been used in this study. The surveys gather data on products derived from the Iberian swine since January 2008. The volumes of dry-cured ham are detailed on two sales formats: whole product and pre-cut or sliced. The monthly information provided revolves around five fundamental variables that are; volume (thousands of kilos), value (thousands of Euros), average value (Euros/kilos), consumption *per capita* (kg) and spending *per capita* (€). We have taken into consideration as the “point of sales” any of the normal means of food supply though this means might not take place through an actual sale. These, therefore, include traditional points of sales for retail and sales channels not related to a fixed point of sales such as, for example, company gifts, personal gifts, direct purchases to the producer or specialty shops; non-traditional distribution and sales channels that are of importance for

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the sales of Iberian ham. The database obtained from the Households panel offers distinguishable data of up to 17 channels, besides one additional called “others”. In order to analyze the consumption of Iberian ham per sales channels, we have grouped the channels from the database “Households” into five groups: A) hypermarkets, B) supermarkets, C) traditional retail, D) specific and E) others. The hypermarkets group only includes this type of establishments. Supermarkets include supermarkets and discount stores. “Traditional retail” includes all types of traditional shops, whether they are general or specialty (butcher shops and delicatessen), together with actual town and open markets. “Specific” gathers those specialty channels previously mentioned and that are of great interest in the case of the Iberian ham. “Others” include the rest of the channels that are not included in the afore mentioned and where the sales of Iberian ham is less common.

3 RESULTS

3.1 ANNUAL EVOLUTION OF THE IBERIAN HAM CONSUMPTION

Table 1 represents the consumption of Iberian ham classified by formats for the last full five years based on the available data we have. In the year 2009, the total volume of consumption increased by 8.55% in comparison to 2008, consumer spending (value) decreased by 3.60%

and the average value of products dropped 11.19%. The variation of the volumes consumed was divided between the increment of the consumption of whole ham, 14.76%, and the decrease of the sliced product, 10%. In 2010 and 2011 consumption increased both in volumes as well as in value for sliced ham and decreased for whole hams, giving as a result a drop in the total volumes. Finally, in the year 2012 the total consumption of dry-cured ham increased around 4.75% in volume and 6.97% in value, the consumption of whole ham increased by 2.65% in volume and by 11.33% in value after two consecutive years of drops and that of the sliced product saw a considerable increase of 11.83% in volume, though value grew only 1.12%.

3.2 SEASONAL AND NON-SEASONAL CONSUMPTION

When it comes to products that do not have a high level of consumption, the meaning of the monthly data by itself – in order to understand the evolution of consumption – is insignificant.

Therefore, it is necessary to make wider temporary groups so as to analyze the data. As such, in the case of Iberian ham, even in those months of higher consumption, market penetration barely goes over 10%. On the other hand, the consumption of Iberian ham has clearly been seasonal, being December the month of the year of major consumption when compared to the rest of the

Table 1: Iberian ham consumption classified by formats in Spanish home (2008–2012)

Year	Product: Iberian ham	Volume (thousands of kg)	Value (thousands of €)	Mean value (€/kg)	Consumption <i>per capita</i> (g)	Spending <i>per capita</i> (€)
2008	Whole product	14,840.46	279,654.70	18.84	0.34	6.39
	Sliced	4,972.29	170,108.07	34.21	0.11	3.88
	Total	19,812.75	449,766.05	22.70	0.45	10.27
2009	Whole product	17,030.42	278,331.20	16.34	0.38	6.18
	Sliced	4,475.42	155,264.18	34.69	0.10	3.45
	Total	21,505.85	433,595.38	20.16	0.48	9.63
2010	Whole product	16,371.47	268,243.94	16.38	0.36	5.84
	Sliced	4,701.39	161,371.75	34.32	0.10	3.51
	Total	21,072.85	429,615.64	20.39	0.46	9.35
2011	Whole product	16,080.42	232,003.79	14.43	0.35	5.03
	Sliced	4,773.54	173,121.05	36.27	0.12	3.77
	Total	20,853.96	405,124.85	19.43	0.47	8.80
2012	Whole product	16,506.36	258,289.15	15.65	0.35	5.61
	Sliced	5,338.45	175,059.63	32.79	0.12	3.82
	Total	21,844.81	433,348.75	19.84	0.47	9.43

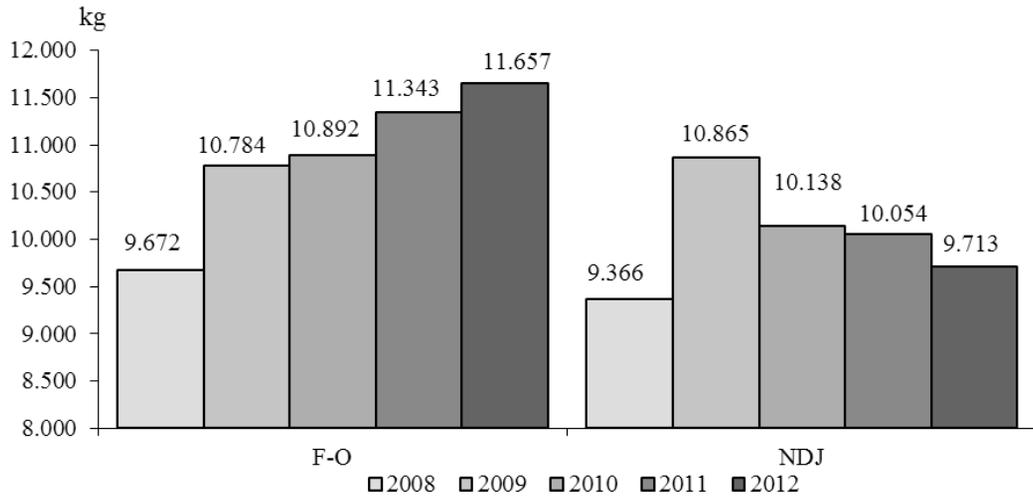


Figure 1: Evolution of the seasonal (NDJ) and non-seasonal (F-O) consumption of Iberian ham (103 kg) in the period of 2008–2012

months. This situation has been confirmed over these years thanks to the data obtained by the Households panel. Furthermore, consumption in November and January are clearly different from the rest of the months and seem to be related to the consumption at the end of the year rather than with any other profile related to the rest of the months. As such, we are interested in dividing the year in two periods: period one that we call seasonal and encompasses November and January (NDJ) and period two that is called non-seasonal and that includes the rest of the months, February to October (F-O).

Fig. 1 shows the evolution of the seasonal and non-seasonal consumption in the five-year study. The most evident and positive conclusion resulting from this graphic is that non-seasonal consumption of Iberian ham shows an increasing trend, in other words, there are clear signs of consumer loyalty outside of the more traditional consumption periods. Also, the graphic clearly reflects that the sales efforts made in 2009 affected both periods. Since then, non-seasonal consumption has increased an 8% whereas seasonal consumption has decreased more than 10%.

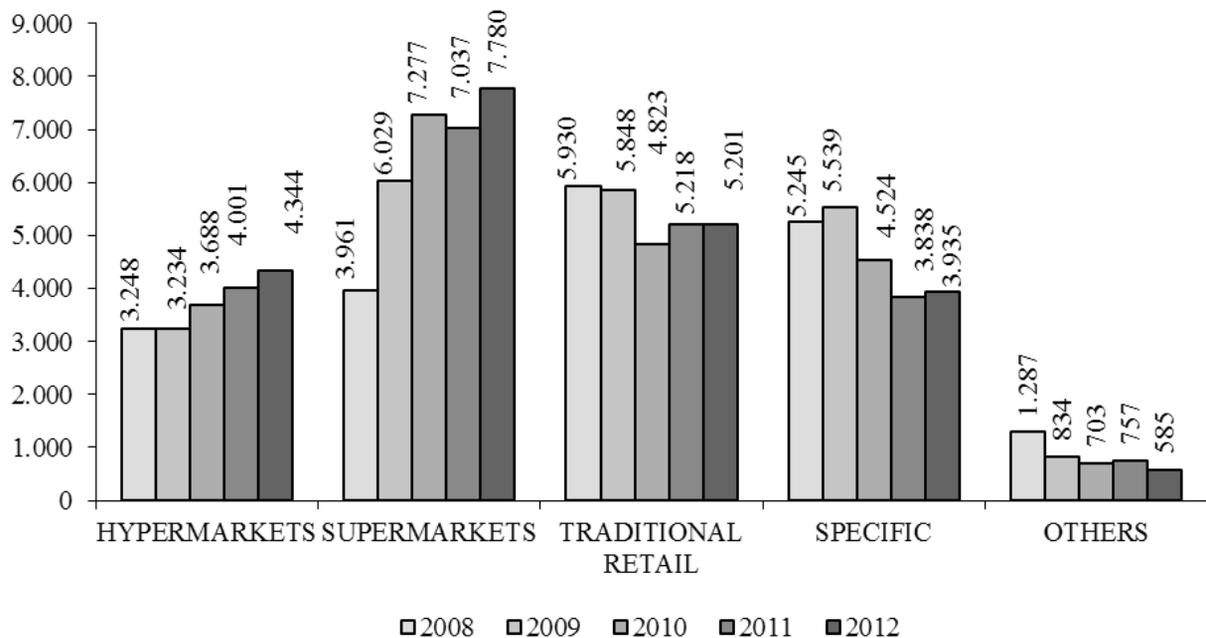


Figure 1: Iberian ham consumption (x 103 kg) in households by distribution channels in the period of 2008–2012

3.3 CONSUMPTION OF IBERIAN HAM BASED ON THE POINT OF SALE

According to analysis of the data received from the surveys performed, the distribution of Iberian ham through traditional “Christmas gift baskets” and company presents is approximately 10% of the annual consumption and more than 20% of the consumption of the month of December. Fig. 2 shows the total consumption of Iberian ham in households by distribution channels in the period of 2008–2012. This period has been characterized by the increasing importance of more modern channels of distribution, hypermarkets and supermarkets, in comparison to the more traditional and specific retailers of products derived from the Iberian swine. In conclusion, supermarkets have gone from selling 20% of the total domestic consumption in 2008 to more than 35% in 2012. Hypermarkets have seen a more moderate increase, going from 16.5% of the domestic sales in 2008 to close to 20% in 2012. Traditional channels have seen a decrease from 30% to 24% and specialty stores have lost a greater market share going from 26.50% in 2008 to 18% in 2012.

4 CONCLUSIONS

The main general conclusions we can draw from this analysis are:

- the total consumption of Iberian ham in the period analyzed has seen a slight increase, especially due to the increment of pre-cut/sliced sales.
- there are clear signs of consumer loyalty, increasing the consumption of ham outside of those traditional periods of the year (NDJ)
- there is an increase in the sales of ham via more modern sales channels (hypermarkets and supermarkets) at the expense of more traditional channels

5 ACKNOWLEDGEMENTS

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6 REFERENCES

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