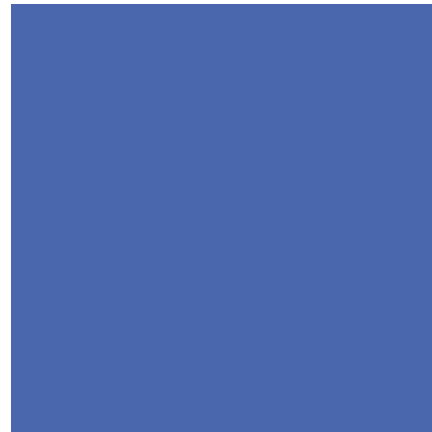


Consumer Perception Survey in Montenegro and neighboring countries

FAO/EBRD – Upgrade of Meat Quality Standards & Exchange of Lessons in
Western Balkans Project



Conclusions and Recommendations from Neighboring Countries



Based on Focus Groups
and In-depth interviews



CONCLUSIONS (1)



■ General conclusions - Individual consumers:

- Purchase habits in Serbia, Bosnia and Herzegovina, Albania, Kosovo and Macedonia are not different in terms of the place for purchase of **fresh meat** such as: **butcher shops, hyper-markets or rural settlements (villages) from relatives/Individual producers.**
- There is no difference in terms of **fresh meat** consumption either in Serbia, Bosnia and Herzegovina, Albania, Kosovo and Macedonia. The only difference is in the type of meat that is dominant in specific cuisines: for **Bosnia** it is **beef or veal**, while for **Serbia** it is pork. In **Albania and at Kosovo** the following is mostly consumed: **beef, chicken, lamb. Pork** is consumed very rarely. Dominant types of consumed meat in **Macedonia** are: **chicken, pork, lamb and beef.**
- Differences among **Bosnia and Herzegovina, Serbia, Albania, Kosovo and Macedonia** are reflected in **purchase habits of meat preparations:**
 - Bosnia and Herzegovina: **hypermarkets**, where everybody shop, and **private butcher shops;**
 - Serbia: **individual producers and specialized stores.**
 - Albania: so-called „**family butcher shops**“ gwhere consumers purchase for many years due to quality and fresh meat
 - Kosovo: **butcher shops** with long-year quality tradition
 - Macedonia: **hypermarkets/butcher shops**



CONCLUSIONS (2)



■ General conclusions - Individual consumers:

- Meat preparations are consumed on daily basis in **Serbia, Bosnia and Herzegovina** and mostly meat preparations of medium-level quality, while more expensive and high-quality meat preparations are consumed on special occasions and during holidays. In **Albania, Kosovo and Macedonia**, the meat of same quality is consumed both on daily basis and in special occasions. In **Macedonia**, the meat with longer shelf life is served in special occasions.
- Quality of meat preparations in **Serbia** is assessed through the following indicators ranked by importance: geographic origin, composition, freshness (shelf-life), price, discounts and actions, packaging, recommendation, availability, advertisement and presentations.



■ General conclusions - Individual consumers:

- Quality of meat preparations in **Bosnia and Herzegovina** is assessed through indicators ranked by importance as follows: geographic origin, price, composition, recommendation, advertisement and presentations and packaging
- Quality of meat preparations in **Albania** is assessed through indicators ranked by importance as follows: production and expiration date, recommendation by relative, brand, packaging, price, presence in the media via advertisements, type of meat the product is made of.
- Quality of meat preparations at **Kosovo** is assessed through indicators ranked by importance as follows: country of origin, quality certificate, production and expiration date, recommendations by relative/friend, taking care of cleanness of meat during the processing.
- Quality of meat preparations in **Macedonia** is assessed through indicators ranked by importance as follows: geographic origin, reputation, smell, colour.
- It is not clear what „the quality certificate“ is in Serbia, Bosnia and Herzegovina and Macedonia, or who should issue it. In Macedonia, the preference is usually given to the country of origin and shelf life. In Albania the „quality certificate“ is quite important and ensures meat quality. However, there is a great distrust in certification institutions, therefore higher confidence is given to foreign certificates, i.e. Foreign (import) products.



■ **General conclusions – Individual consumers:**

- Attitudes towards Montenegrin products are to certain extent similar to those of Serbia and Bosnia and Herzegovina - perceived as high-quality ones, but in Bosnia and Herzegovina there is higher awareness and knowledge of Montenegrin products, while in Serbia the accent was put on country of origin.
- In Albania, Montenegrin products are generally not consumed, except in Skadar, where mortadela and spicy salami are consumed. There are even cases of coming to the border with Montenegro just in order to purchase this type of salami.
- In Kosovo, attitudes towards Montenegrin products are positive. They consume the meat of „Franca“ brand, which is found in all super markets and considered as good quality. They don't know if fresh meat is imported from Montenegro.
- In Macedonia, consumers are aware of Njeguška pršuta and considered it as high quality product. Except for Goranovic, they did not hear of any other producer in Montenegro.



■ **General conclusions – Individual consumers:**

- In Serbia and Bosnia and Herzegovina njeguški pršut of Montenegrin origin with quality certificate would be considered as high-quality product, which price should be 10% higher than the price of currently available products; in Bosnia and Herzegovina it is important that the products originates from Njeguši.
- In Albania, consumers are not aware of Njeguški pršut, but they would be intereszed to try it if the price and the quality would be at satisfactory level. As for geographic origin, it is not so important to them, while the „quality certificate“ is the most important upon selection of meat products.
- At Kosovo, consumers are generally unaware of Njeguški pršut. In Mitrovica, they reject import of Motenegrin products due to the lack of trust in their quality, while in Prishtina they are ready to try it if it meets certain quality standards. One of consumers tried Njeguški pršut and said it was of very good quality.
- In Macedonia, they recommend better marketing of Montenegrin products.



CONCLUSIONS (6)

■ **General conclusions - Restaurants:**

- The restaurants build their reputation based on meat specialties they prepare, and clients choose them based on those. There are no differences among Serbia, Bosnia and Herzegovina, Kosovo and Albania.
- Types of meat offered in the menu of restaurants are different; in Serbia, they offer pork, baby beef, veal, while in Bosnia and Herzegovina they offer veal and baby beef. In Albania and Kosovo, restaurants offer beef, chicken, lamb and very rarely pork, while in Macedonia the types of meat mostly served are chicken, pork, lamb, beef and fresh fish.
- Preference of guests define meat preparations served as cold appetizers; differences between Serbia and Bosnia and Herzegovina are related to local customs of consuming specific types of meat preparations. In Albania and Kosovo, the same type of meat preparations are offered both on daily basis and in special occasions.
- Restaurants in Serbia and Bosnia and Herzegovina usually supply with fresh meat from private slaughterhouses. The difference is noted in the frequency of supplying with fresh meat – restaurants in Serbia procure it on daily basis, while in Bosnia and Herzegovina it is procured 1-2 a week. In Albania and Kosovo, fresh meat is procured from reliable and long-term suppliers, 3-4 times a week depending on demand, while in Macedonia fresh meat is procured on weekly basis or more often if necessary.



CONCLUSIONS (7)



■ **General conclusions - Restaurants:**

- Locally produced meat preparations are procured in hyper markets in Bosnia and Herzegovina and Serbia, while import products are procured through reliable suppliers with established long-term cooperation. In Bosnia and Herzegovina, sujuc is dominant imported product and Njeguški Pršut in both countries. In restaurants in Albania, it is exclusively asked for fresh Albanian meat, while in case of meat preparations, they prefer products imported from Western European countries. As for Montenegrin meat, it has never been on the menu and they don't plan to have in future either. The reason is the lack of trust in Montenegrin products and the lack of control. In macedonia, meat preparations are usually procured in super markets.
- The quality of prosciuto is important for restaurants in Serbia, Bosnia and Herzegovina and the care is taken to have recognizable look, smell, taste, elasticity, moist and salinity.



■ **General conclusions - Restaurants:**

- Geographic origin of Njeguški prosciutto is very important in Macedonia, while in Bosnia and Herzegovina they pay much attention that the product originates from Montenegro, while in Serbia it is specifically asked to be from Njeguši.
- Restaurants do not have clear remarks that the product originates from Montenegro, because guests are usually not interested to know the product's origin, but should this be the case, personnel in restaurants in Serbia, Bosnia and Herzegovina and Macedonia have all necessary information on offered products.
- The expected price of Montenegrin products with Quality Certificate is higher than the one currently offered by supplier of Montenegrin products, but the restaurants are ready to pay this price, while in Bosnia and Herzegovina this higher price, although expected, was not acceptable, while in Macedonia they have a specific price for prosciutto they stick to, but in the end, the quality is the main preference.



RECOMMENDATIONS (1)



- **Individual consumers - Serbia:**

- For Serbia, the recommendation is that the meat preparations should be offered in specialized shops– shops only for prosciutto and big trade chains, especially markets.
- Regarding the preferences in consumption of meat preparations in Serbia, the products that would be well accepted are the following: **prosciutto** (higher price rank) and sausages, frankfurters, ham and other sausages (middle price rank).
- The products should be clearly marked with the following: **expiry date** and **composition with the accent on percentage of pure meat in the preparation** and country of origin. If it is possible, the packaging for the products should be made of **transparent vacuum foil and inevitably with no water in it**. It is advised the constant offer of these products at retail outlet.
- Fresh meat and meat preparations of Montenegrin origin should be clearly marked at retail spot, and the following could be used as markers:
 - Special shelves with brand mark and country of origin with clearly indicated mark of quality certificate.
 - For display in show case in shops, the flag of Montenegro should be put on products, at a visible position, and the certificate for quality should be displayed at the showcase, if it is possible.
 - Advertisement should direct attention to brands originated from Montenegro. It is necessary to highlight that it **is about traditional products produced in Montenegro, complying with procedures and techniques**.



RECOMMENDATIONS (2)



- **Individual consumers– Bosnia and Herzegovina:**

- In Bosnia and Herzegovina, meat preparations should be offered in following shops: Franca, Bingo (trade center) and Alko due to high turnover and prestige that they have.
- Meat preparations in Bosnia and Herzegovina that would be well accepted are the following: **prosciutto** (higher price rank), **sausages, frankfurters, ham and other sausages** (middle price rank).
- The products should be clearly marked with the following: **expiry date and composition with the accent on percentage of pure meat** in the preparation. The packaging should be made of **solid and transparent vacuum foil and inevitably with no air inside of it**. It is recommended the constant offer of these products at retail outlet.
- Fresh meat and meat preparations of Montenegrin origin should be **clearly marked at retail outlet, arranged nicely, and packed in attractive packaging**, to be placed at the visible spot in a showcase, and if possible, the certificate for quality should be displayed as well..
- Advertisement should direct attention to brands originated from Montenegro. It is necessary to highlight that it is about **traditional products** produced in Montenegro, and if it is about the Njeguši prosciutto it should be highlighted that it originates from Njeguši.



RECOMMENDATIONS (3)



- **Restaurants – Serbia and Bosnia and Herzegovina:**
 - Meat preparations which are suggested to be offered in restaurants:
 - in **Srbiji**: Njeguška prosciutto and Njeguški neck.
 - in **Bosnia and Herzegovina**: Njeguši prosciutto and sujuk.
 - When it is about the distribution of meat preparations of Montenegrin origin, it is recommended to contact with the restaurants through **direct distributors and suppliers**, while targeted contact persons are the following: **chief of cuisine, restaurant manager and owner of the restaurant.**
 - The prices which are offered in the restaurants for Njeguši prosciutto with Montenegrin origin and quality certificate could be following:
 - **For Serbia**, more than the current prices which are offered now by their suppliers;
 - **For Bosnia and Hercegovinu**, they could not be higher than the prices which they pay now now to their suppliers.



RECOMMENDATIONS (4)



- **Main recommendations from the FGD and in-depth interviews held in Albania are as below:**
- **It is recommended a more powerful penetration** into the Albanian market with some of the meat products like ham, stressing the quality of them and the unique taste via **advertisements and seminars**, including also sample testing.
- 'Educating'' people regarding the quality in order not to associate top of mind awareness that people have for Macedonian meat to Montenegrin meat also
- **Higher penetration** of the Montenegrin brand of fresh meat in the **official routes of importing**, followed by all the necessary meat quality certifications.
- The fact some of the participants were very satisfied from the Montenegrin products consumption, to the point of driving till there to buy the product, it is an opportunity of potential demand in the future after the products are promoted and tested in the Albanian market. So, it is recommended an effective promotion of these products, using media advertisement, product testing, etc.
- Most of the population consumes the meat products of the domestic market (with price and average quality) and Italian products (with price and high quality). Products from Montenegro can compete both of these, depending on the specific products, as the market expressed interest for Montenegrin products (having no judgment of the origin) after advertising them and giving additional information, and making sure they are certified.



RECOMMENDATIONS (5)



- **Main recommendations from the FGD and in-depth interviews held in Kosovo are as below:**
 - It is recommended a more **powerful penetration** into the Kosovo market with some of the meat products like ham, stressing the quality of them and the unique taste **via advertisements and seminars**, including also sample testing. Also they were interested for Njeguška Pršuta (especially young participants) when they were communicated that it is a product of a premium quality compared to the one existent in the market.
 - **Emphasize the quality and uniqueness** for specific Montenegrin meat products in order to have an advantage and acceptance when entering the market of Kosovo.
 - In the moment of promoting the products the companies should emphasise the fact that they are from Montenegro, since there is a correlation with Serbia. So, it is recommended more emphasise on the country of origin, during the promotion of products.



RECOMMENDATION (6)



- **Main recommendations from the FGD and in-depth interviews held in Makedonija are as below:**
 - They are ready to taste and buy specific traditional MNG products, but they ask for more visibility and marketing. They mention that they have heard that MNG has good sausages, they want to try it.
 - More visibility and marketing for MNG products.



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