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Study on meat consumption habits

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SUBMITTED BY
SURVEY & MARKET RESEARCH TEAM

SMART
SURVEY & MARKET RESEARCH TEAM

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1.0 INTRODUCTION

Sri Lanka is home to a multi ethnic, multi religious population of 17.6 million. Predominantly an agricultural country, 70% of her people reside in rural areas and are engaged in agricultural activities. However, industry is steadily picking up in the urban and semi urban areas and the sectoral composition of the economy is slowly changing towards a more manufacturing and service oriented one. Majority of the people of Sri Lanka are Buddhists with a history of over 2,500 years and is one of the few countries in the world with such a high concentration of Buddhists. The strong influence of India on cultural, social and political aspects of Sri Lanka has resulted in several socio-cultural traditions similar to that of India. As a consequence of this influence and the fact that the Sri Lankan population consist of 16% Hindus, some Sri Lankan Buddhists also share the Hindu beliefs. To add to this mix of Buddhist and Hindu beliefs, are the western and Christian based beliefs that were introduced to the country through the Portugese, Dutch and English rule during the latter part of the 19th century. Hence, one could say Sri Lanka's mix of cultural and religious groups has given rise to a unique combination traditions, beliefs and habits. Furthermore, our culinary preferences and habits, the majority of which have originated from India have been subject to influences from other Asian cultures as well as the West.

Sri Lanka as a nation has a long tradition of meat consumption with a relative conservatism in regard to meat eating habits as opposed to the exotic eating habits of her neighbours to the east. The main meat products that are consumed have being restricted to fish, chicken, pork, mutton and beef and are being consumed only in moderate quantities. The available statistics indicate that the 10% of the highest income earning households in Sri Lanka spend approximately Rs 6,950 on food items out of which an average of Rs 520 is spent on meat on a monthly basis. The average consumption rates in Sri Lanka are lower than that of developed countries but studies indicate that it is on a steadily increasing trend. Chicken consumption per head has increased from 0.7Kg in 1990 to 2.6Kg in 1995 and is expected to reach 7.3Kg per head in 2000. With respect to other meats, available import statistics indicate that beef imports have increased by 53%, lamb and mutton

imports have increased 489% and poultry has increased by 60% while pork imports have decreased form 1985 to 1995.

Having a population with a high literacy of at least 88%, the awareness of the nutritional value of meals consumed is high among the average Sri Lankan. This knowledge is further supplemented by the government health educational programmes carried out at grassroot levels of society which emphasize the pivotal role of a well balanced diet and an adequate protein intake in keeping a person healthy. Therefore the main barrier for the increase in meat consumption may be mainly economic than social or cultural.

When looking from an angle of price and production, under natural circumstances fish should be one of the cheapest and the abundant meat sources in the country. However, today it is the most expensive and scarce meat source in the island, which could be attributed to the on going civil war that limits the areas available for fishing and lack of investment in the domestic fisheries industry. In contrast, the poultry industry has grown rapidly during the last few years and has resulted in the chicken prices being relatively stagnant over the past five years or so, while mutton prices increased by 102%, pork prices by 154% and fish prices increased by 390%. As a consequence, today chicken has changed its role from the delicacy on the menu to the common and cheapest dish on the dinner table.

Due to the high frequency of chicken being consumed on a daily basis, there is a definite trend among the high income category to try out viable alternatives. The objectives of this study were to find out these alternatives and to study the current consumption habits, consumption trends and perceptions about traditional and non-traditional meat consumption in Sri Lanka.

2.0 OBJECTIVES OF THE RESEARCH

The primary objective of the study was to identify current meat consumption trends in the Sri Lankan market.

Specifically, the objectives were:

- To identify trends in meat consumption among the up market (upper middle income and higher) consumers with respect to

  Quantity consumed
  Types of meat consumed
  Frequency of consumption
  Profiles of chicken consumers vs consumers of other meats and
  Preferences for different types of meat
  General attitudes and perceptions towards meat consumption

- In addition to above the study was also designed to obtain an indication of price elasticity of demand and to analyze trends in meat imports through available secondary data.

3.0 APPROACH AND METHODOLOGY

The survey was designed to cover only the middle to high income households in the most urbanized areas of the country since this segment of people are believed to be the trend setters in the Sri Lankan society. The design of the study was mainly quantitative in nature and consisted of a sample survey of 500 households from middle to upper income classes whose results can be generalized into the population of meat consumers. The study also includes a segment of results of analysis of secondary data on meat imports and other available statistics on meat consumption.

A two stage combined cluster - quota sampling method was used to select the households from each of the following areas:

Colombo MC
Dehiwala, Mount Lavinia, Ratmalana, Moratuwa
Kotte, Battaramulla, Nawala
Nugegoda and suburbs
Gampaha urban areas such as Peliyagoda, Kelaniya, Wattala, Seeduwa etc.

The data was collected through "face-to-face" interviews conducted by our network of field investigators based in the respective districts. In each household selected, a meat consumer who is also a person that influences the decisions about the family's meals were interviewed based on quotas that were set to cover 50% males and 50% females. In each of the above areas, quotas were also set to select the middle income to upper income houses. Accordingly, 20% of the households were in the income category of Rs 3,500 - Rs 5,000, while those between the categories of Rs 5,001- Rs 7,500, and Rs 7,501- Rs 10,000 were 23% and 22% respectively. Furthermore, 35% of the households fell within the category of those earning above Rs 10,000.

In order to enhance the results of the 500 household sample survey, the study also included 2 focus group discussions (FGD) among 12 members of the target group of trend setters in the high income groups. The cells for these FGD's were based on age and gender since eating habits change mainly on these characteristics which are related to health conditions too.

Cell 1	Cell 2
1 Session Married females of the high income group (Rs 4,000 and above) who run a household. *age : above 30 yrs*	*1 Session* Married males of the same high income group who are heads of households. *age : Above 30 yrs*

The information obtained from these discussions which were held at a reputed location, are also embedded into the discussion given in this report.

4.0 RESULTS AND ANALYSIS

The following are the results obtained from the 500 household survey conducted in the urban areas of Colombo and Gampaha, covering households with a monthly income of at least Rs 3,500, and a series of focus group discussions also on the subject matter of the study. It should be noted that where ever appropriate the information gathered from the qualitative study has also been included into the discussions given in this report. Throughout the report, the results on all the meats have also been compared with that of fish and soya meat.

The sample consisted of 50% males and 50% females, 20% of households were with incomes between Rs.3,500 - Rs.5,000, while 35% were with incomes above Rs 10,000. With respect to occupation 17% were in trade, and 12% were in clerical type of occupations, while 21% were unemployed. The majority of 72% of households had 3-5 members and 37% them had two children in the household, while 18% had no children. The sample covered 54% Buddhists, 30% Christians, 9% Muslims and 3% Hindus and 68% of the respondents were above 35 years of age. The criteria for participation in the survey was that they belong to the above Rs. 3500 income group, are regular meat consumers and gets involved in the decision of purchasing meat for the household.

4.1 Current Usage Habits of Meat

4.1.1 Types of meat purchased/consumed in the target household

What kinds of meat do you purchase for this household?	*Percentage*
Beef	47
Chicken	95
Pork	34
Mutton	39
Wild Boar	9
Duck	3
Turkey	2
Lamb	1
Rabbit	0
Fish	74
Soya Meat	60
Other	4

The above table depicts the types of meat purchased by the middle and upper income group (target group) Sri Lankan meat purchasing households. Note that this table only gives the percentage of households that purchases these types at one time or the other.

Out of the many competing types of meat currently available in the market, a vast majority of 95% of the target households proved to be purchasing chicken, clearly indicating that chicken is the most preferred type of meat in Sri Lankan households. As reinforced by the qualitative information we have gathered, certain culinary preferences, habitual reasons and the wide availability of the product seem to be some of the main reasons for this outcome.

Apart from chicken, it was found that fish is mostly purchased item among the majority of these households with 74% of them purchasing fish. Given the various socio-cultural constraints faced by households in meat consumption and the lack of any such considerations on the consumption of fish, and also its ready availability, fish seem to be a very popular item in the average household meal.

Soya meat too, appeared to have penetrated itself into the highly competitive market and proved to have gained much popularity as 60% of the respondents seem to purchase it for their respective households.

It is significant to note that only 47% of the target households indicated that they purchased beef. It was found in the focus group discussions that religious and social reasons were to a great extent the reason for this low consumption of beef in Sri Lanka than the health hazards associated with eating red meat.

It was also found that mutton and pork too were not so widely purchased as that of chicken and fish. In the case of mutton, the non consumption category consisted of 61%. The discussions brought out the fact that the low consumption of mutton was mainly due to unavailability, price and the lack of trust as to what is actually being sold as mutton. This is in contrast to the religious and social reasons for the unpopularity of beef and pork. With regard to pork, again 66% proved to be non eaters of pork, due to reasons of religion, non availability and price. It was found in the discussions that not only Muslims but even most Buddhists do not bring pork in to their homes due to various beliefs associated with the hygiene of the animal.

Wildboar, being quite similar to pork was found to be consumed by a very small proportion of people with over 91% of the sample not consuming that type of meat at all. Here, the unfamiliarity and the unavailability of the meat were the main reasons for the unpopularity of the meat.

Duck and Turkey even though somewhat similar to chicken, still appeared to have a large percentage of non-eaters, with some 95% saying that they had not tried these types of meat. Again the reasons found out through the FGD suggest that it is mainly due to the unavailability of this type of meat caused by the lack of demand for it.

In the case of rabbit meat, an interesting point that was found during the FGDs on this non consumption is that most thought of rabbit as a pet and therefore they said most could not rationalize the consumption of meat of such a harmless animal.

4.1.2 Frequency of consumption

Approximately how many times a week do you consume Beef?	*Percentage, of total consumers (47%)*
Less than once a week	24
Once a week	29
Twice a week	22
3 times a week	10
4-5 times a week	8
Every day	7

Of those who consume beef, it was found that 29% were weekly consumers while 22% consumed beef twice a week. A further 25% was found to eat beef more than three times a week. Apart from chicken consumed by 85% of the household, beef seem to be the most frequently consumed type of meat among the high income households.

Approximately how many times a week do you consume Chicken?	*Percentage, of total consumers (95%)*
Less than once a week	14
Once a week	42
Twice a week	21
3 times a week	13
4-5 times a week	6
Every day	4

When considering the frequency of consumption of chicken among the target Sri Lankan households consuming chicken, it was found that 42% of these respondent households consume chicken approximately once a week while the consumption rate of twice and three times a week were 21% and 13% respectively. Only 4% said they consume chicken on a daily basis. This analysis therefore finds that almost 86% of the target households consume some amount of chicken at least once a week indicating the vast popularity of the type of meat.

Approximately how many times a week do you consume Pork?	*Percentage, of total consumers (34%)*
Less than once a week	41
Once a week	22
Twice a week	19
3 times a week	5
4-5 times a week	5
Every day	8

Pork too appear to be consumed at a low rate of consumption than chicken with 41% of pork consumers eating pork less than once a week.

Approximately how many times a week do you consume Mutton?	*Percentage, of total consumers (39%)*
Less than once a week	66
Once a week	21
Twice a week	8
3 times a week	3
4-5 times a week	
Every day	2

The consumption frequency relating to mutton is much less than the frequency associated with chicken. Even though marginally more households consume mutton over pork, their frequency of consumption is less than that of pork indicating that mutton is more of an occasional meat than pork. While 66% of all mutton consumers mentioned that they consume mutton less than once a week 21% appear to be consuming it once a week.

Approximately how many times a week do you consume Fish?	*Percentage, of total consumers (74%)*
Less than once a week	0
Once a week	8
Twice a week	8
3 times a week	17
4-5 times a week	17
Every day	50

A significant finding with respect to frequency of fish consumption is that unlike meat, almost all those who consume fish, or 84%, do it at least three times a week. This is in contrast to chicken and fish, at 25% consumption of at least three times a week.

Approximately how many times a week do you consume Soya meat?	*Percentage, of total consumers (60%)*
Less than once a week	60
Once a week	20
Twice a week	-
3 times a week	-
4-5 times a week	-
Every day	20

It is clear that the frequency of soya meat consumption is low, with the vast majority consuming it only once a week or even less.

4.1.2.1 Frequency of Consumption of Meats by Gender

Beef

Approximately how many times a week do you consume Beef?	*Male, % (total 40%)*	*Female, % (total 36%)*
Less than once a week	26	24
Once a week	36	27
Twice a week	16	27
3 times a week	10	10
4-5 times a week	6	5
Every day	6	7

With respect to frequency of beef consumption among the target group, it was found that approximately half of them consume beef either once or twice a week, immaterial of the gender.

Chicken

Approximately how many times a week do you consume Chicken?	*Male, % (total 93%)*	*Female, % (total 89%)*
Less than once a week	16	12
Once a week	40	43
Twice a week	23	20
3 times a week	11	16
4-5 times a week	6	6
Every day	4	3

There does not appear to be any significant difference in gender with respect to those who consume chicken in the frequency pattern depicted above even though slightly more males seem to be consuming chicken than females. It is seen that of both genders chicken is eaten up to 3 times a week by the vast majority.

Pork

Approximately how many times a week do you consume Pork?	*Male, % (total 39%)*	*Female, % (total 37%)*
Less than once a week	43	41
Once a week	20	22
Twice a week	20	16
3 times a week	8	5
4-5 times a week	5	5
Every day	4	11

In terms of pork consumption frequency by gender once again no significant difference is seen. However as in chicken, it is found that males eat pork marginally more than females and that across gender, around two thirds eat pork once a week the most.

Mutton

Approximately how many times a week do you consume Mutton?	*Male, % (total 40%)*	*Female, % (total 36%)*
Less than once a week	69	66
Once a week	17	21
Twice a week	7	8
3 times a week	4	1
4-5 times a week	-	3
Every day	3	1

There does not appear to be any gender differentiate in terms of frequency of mutton consumption in the target Sri Lankan households, with the bulk of both males and females being occasional consumers.

4.1.2.2 Frequency of Consumption of Meats by Age

Beef

Frequency	*less than 25 yrs*	*25 - 30 yrs*	*31 - 35 yrs*	*more than 35 yrs*
Less than once wk	19	18	27	25
Once a week	-	27	35	31
Twice a week	-	18	28	23
3 times a week	-	32	-	8
4-5 times a week	62	5	7	5
Every day	19	-	3	8

In terms of frequency of beef consumption what is seen is that those consumers in the age groups of less than 25 years and 25 - 30 years seem to be rather frequent consumers with more than two thirds of the first group and close to 40% of the second group eating beef at least three times a week. The older groups however seem to be relatively less frequent consumers with majority of them eating beef once a week or less.

Chicken

Frequency	*less than 25 yrs*	*25 - 30 yrs*	*31 - 35 yrs*	*more than 35 yrs*
Less than once wk	7	21	23	12
Once a week	30	34	36	45
Twice a week	24	22	26	20
3 times a week	16	13	11	13
4-5 times a week	16	4	2	7
Every day	7	6	2	3

Unlike the other meats analyzed here where the frequency is skewed towards less frequent consumption, chicken consumption pattern seem to be once or twice a week for most of the respondents who eat chicken across all age groups identified. Again, the younger groups of less than 25 years and 25 - 30 years group seem to be the most frequent consumers with 39% of the earlier group and 23% of the latter group consuming chicken at least thrice a week.

Pork

Frequency	*less than 25 yrs*	*25 - 30 yrs*	*31 - 35 yrs*	*more than 35 yrs*
Less than once wk	43	36	50	41
Once a week	29	24	15	22
Twice a week	-	24	23	17
3 times a week	-	8	6	6
4-5 times a week	14	-	6	7
Every day	14	8	-	7

With respect to the frequency of consumption of pork among consumers of that meat, it can be seen that it is skewed towards less frequent consumption with most in all age groups eating pork either once a week or less. It can be seen that the older persons consume relatively less frequently than the younger ones.

Mutton

Frequency	*less than 25 yrs*	*25 - 30 yrs*	*31 - 35 yrs*	*more than 35 yrs*
Less than once wk	70	57	70	66
Once a week	30	12	17	22
Twice a week	-	24	9	5
3 times a week	-	-	4	3
4-5 times a week	-	-	-	2
Every day	-	7	-	2

The above table indicates that of those who consume mutton, most fall in to the category of less frequent consumers across age groups, with almost two thirds consuming less than once a week. However, about a third of the mutton consuming respondents in the age groups of 25-30 years seem to be consuming mutton once or twice a week, and those above 30 yrs seem to be the most frequent consumers of mutton.

4.1.3 Quantities of meat consumed

4.1.3.1 Amount of Meat Purchased for the household per month

	Quantity purchased per month						
	Less than 250g	250-500g	500-1kg	1kg-2kg	2kg-3.5kg	3.5kg-5kg	More than 5kg
Beef	55	2	4	8	1	12	18
Chicken	9	-	7	11	10	29	34
Pork	72	2	8	6	-	7	5
Mutton	65	9	10	5	2	6	3
Wildboar	97	2	1	-	-	-	-
Duck	100	-	-	-	-	-	-
Turkey	100	-	-	-	-	-	-
Lamb	100	-	-	-	-	-	-
Rabbit	100	-	-	-	-	-	-
Soya	64	19	10	5	1	-	1
Fish	13	3	13	14	11	23	23

4.1.3.2 Consumption quantities

Approximately how many grams of meat (all meats combined) do you consume per day?	*Percentage*
0 - 25 gm	5
26 - 50 gm	15
51 - 75 gm	16
76 - 100 gm	17
100 - 125 gm	17
Over 125 gm	30

Even though meat being considered to be a very important part of the meal by many households only 30% of the 500 respondents seem to be consuming more than approximately 125 grams of meat (all meats combined) per day, while a majority of the respondents, or 64% was found to consume more than 75 grams per day. A significant proportion of almost a third of the respondents in the target households, consumed between 25 - 75 grams per day.

4.2 Trends in consumption habits

4.2.1 Trends in consumption compared to an year ago

Do you consume more meat now as compared to an year ago?	*Percentage*
More than an year ago	16
Less than an year ago	35
About the same	49

It is interesting to note that 35% of the sample claim that they eat less meat now than an year ago while only 16% stated they have increased their consumption of meat.

4.2.1.1 Consumption trends as compared to the past, by gender

	Male	*Female*
More than an year ago	18	15
Less than an year ago	34	38
About the same	48	47

4.2.1.2 Consumption trends as compared to the past, by age

	below 25 yrs	*25 - 30 yrs*	*31 - 35 yrs*	*Over 35 yrs*
More than an year ago	34	13	16	16
Less than an year ago	21	36	25	38
About the same	45	51	59	46

There do not seem to be any significant difference in the change in consumption quantities between males and females from the immediate past to now.

However, it is obvious that the younger consumers of below 25 years of age are consuming more meat now than the previous year where as the older consumers have not changed their consumption patterns.

4.2.1.3 Types of meats consumed more and consumed less, as compared to AN YEAR AGO

Kind of meat	*More*	*Less*	*About the same*
Beef	21	34	45
Chicken	24	31	45
Pork	19	36	45
Mutton	11	31	58
Wild Boar	20	33	47
Duck*	22	33	45
Turkey*	22	33	45
Lamb*	25	33	42
Rabbit*	25	38	37
Fish	37	23	40
Soya meat	27	16	57

* *Sample sizes too small*

There seem to be a decreasing trend in consumption of pork and beef while there seem to be an increasing trend in consumption in fish and soya meat as compared to an year ago. Even though for chicken it was found that overall more respondents said less of it is being consumed than a year ago, a significant proportion of the target group indicated an increase of their chicken consumption.

As reinforced by the focus group studies on the reasons for the reduction of consumption of beef seem be mostly due to certain prevalent cultural reasons and social stigmas attached to eating beef, rather than purely religious reasons. However for pork, it was more religious and health reasons for the reduced level of consumption. When considering mutton, the scenario was very much different with most indicating that they had no social, cultural or religious factors stopping them from eating mutton, but it was unavailability, not getting value for money and hassle of preparation that kept them from consuming more mutton.

4.2.2 Trends in consumption in an year from now

Do you think you will consume more meat in the coming year, than now?	*Percentage*
More than now	13
Less than now	30
About the same	57

From the tables above, it could be seen that a majority of 57% of the 500 respondents interviewed was unlikely to either increase or decrease their consumption quantity of meat within the coming year thus maintaining the same consumption levels. However, while a 30% mentioned that they would curtail their meat consumption quantities within the forthcoming year, only 13% indicated a perceived increase. These results seem to indicate a trend towards reduced consumption of meat among this target group, the reasons for which maybe several fold as analyzed later in the study

4.2.2.1 Expected consumption in the future, by gender

	Male	*Female*
More than now	16	12
Less than now	27	32
About the same	57	56

4.2.2.2 Expected consumption in the future, by age

	below 25 yrs	*25 - 30 yrs*	*31 - 35 yrs*	*Over 35 yrs*
More than now	27	13	10	13
Less than now	21	28	15	33
About the same	52	59	75	54

It can be seen that from those who are likely to increase their consumption of meat, males are slightly more likely than females to do so in the forthcoming year. However, when compared to their consumption change from last year, it seems that the rate of increase as measured by the number of those who increased consumption from the previous year to this year and then plan to increase next year, is diminishing for both males and females.

With respect to age, it is clear that the below 25 years consumers are more likely to increase their consumption of meat while the others will be more likely to reduce their consumption.

4.2.2.3 Types of meats expected to be consumed more and consumed less, as compared to NOW

Kind of meat	*More*	*Less*	*About the same*
Beef	12	35	53
Chicken	18	29	53
Pork	11	36	53
Mutton	11	29	60
Wild Boar*	17	17	66
Duck*	25	25	50
Turkey*	25	25	50
Lamb*	33	33	34
Rabbit*	33	33	34
Fish	34	20	46
Soya meat	29	15	56

** Sample sizes too small*

It was found that for chicken, while 53% of the current consumers stated they will maintain a constant consumption pattern, 29% emphasized on a potential drop in their consumption. However, 18% perceived an increase in the consumption in the future indicating that among meats, chicken seem to be the meat with a relatively strong demand for the future.

In terms of beef, half of the respondents demonstrated a constant consumption pattern for the forthcoming year, while an increase in the potential consumption was seen with respect to 12%.

Of the current mutton consumers only 11% showed some indication as to an increase in the consumption pattern for the forthcoming year. Pork too being consumed in reasonable amounts in Sri Lanka, only a very few, or 11%, indicated in an increase in their expected purchases.

Of those who consume lamb, one third mentioned as to maintaining the same level of consumption while almost the same proportion said they would either increase or decrease their consumption of it.

In the case of those who consume rabbit meat, 33% each said they would either remain constant, increase or decrease their level of consumption.

With respect to the increase in consumption of fish in the forthcoming year, 46% of the sample said they would maintain the same levels of consumption, while only 20% said they would cut down on it. 34% of those interviewed said they would increase the consumption of fish in the forthcoming year, making fish to have the highest demand in the future.

Of those who consume soya meat, 15% said their consumption would decreased next year, while twice that number, or 29% said that their consumption would increase. 56% said they would maintain a constant level over the current year.

For wildboar, duck, turkey, lamb and rabbit there seem to be a trend towards an increase in the consumption with 25% each saying that they will eat more of duck and turkey in the future and 33% saying so for lamb. The sample sizes are too small and hence any generalizations should not be made with the numbers for these types of meat.

The perceptions and attitudes of the respondents in relation to their expected meat consumption pattern for the forthcoming year could be analyzed as having a decreasing trend in consumption of beef, chicken, pork and mutton while having an increasing trend in consumption in fish and soya meat as compared to the present. However, for the non-traditional meat types considered the trend can go either way since 50% stated they will increase consumption and vice versa. It should be noted that the sample sizes here are insufficient for this type of analysis.

4.2.2.4 Consumption Trends by Gender by Type of meat

Beef

Gender/Consumption in an year ago	*More than now*	*Less than now*	*About the same*
Male	6	15	25
Female	5	17	20

Note: The no response percentage should be added to the rows to make total 100%

Chicken

Gender/Consumption in an year ago	*More than now*	*Less than now*	*About the same*
Male	16	23	52
Female	17	28	44

Note: The no response percentage should be added to the rows to make total 100%

Pork

Gender/Consumption in an year ago	*More than now*	*Less than now*	*About the same*
Male	5	8	15
Female	2	12	15

Note: The no response percentage should be added to the rows to make total 100%

Mutton

Gender/Consumption in an year ago	*More than now*	*Less than now*	*About the same*
Male	5	9	21
Female	3	10	22

Note: The no response percentage should be added to the rows to make total 100%

Wildboar

Gender/Consumption in an year ago	*More than now*	*Less than now*	*About the same*
Male	1	1	3
Female	1	2	5

Note: The no response percentage should be added to the rows to make total 100%

Turkey

Gender/Consumption in an year ago	*More than now*	*Less than now*	*About the same*
Male	0	0	2
Female	1	1	1

Note: The no response percentage should be added to the rows to make total 100%

Soya Meat

Gender/Consumption in an year ago	*More than now*	*Less than now*	*About the same*
Male	15	6	28
Female	15	8	26

Note: The no response percentage should be added to the rows to make total 100%

Fish

Gender/Consumption in an year ago	*More than now*	*Less than now*	*About the same*
Male	32	17	39
Female	27	17	41

Note: The no response percentage should be added to the rows to make total 100%

With respect to the differences among males and females, on consumption in the near future, females seem to be more likely to reduce their consumption of pork and chicken while males are more likely to increase their consumption of fish. There was no significant patterns observed with respect to other meats.

4.2.2.5 Consumption Trends by Age by Type of meat

Beef

Age/Consumption	*More than now*	*Less than now*	*About the same*
Less than 25 yrs	-	13	19
25 - 30 yrs	8	23	21
31 - 35 yrs	4	14	34
More than 35 yrs	5	15	20

Note: The no response percentage should be added to the rows to make total 100

There is no significant pattern in the change in consumption of beef in the near future among different age groups with over 20% in each group wanting to keep it unchanged.

Chicken

Age/Consumption	*More than now*	*Less than now*	*About the same*
Less than 25 yrs	25	13	44
25 - 30 yrs	15	31	36
31 - 35 yrs	16	17	56
More than 35 yrs	17	27	47

Note: The no response percentage should be added to the rows to make total 100%

In terms of chicken, a considerable number of 25% respondents below 25 years perceived an increase in the consumption of chicken for the forthcoming year while 44% said they would maintain the same consumption level. This was followed by 15% of respondents between 25 - 30 years also stating a perceived increase when compared to the existing year and 36% being constant. Only 13% of those below 25 years said there would be a decrease in consumption. Overall, there is a tendency for the younger group to consume more chicken while those above 30 years are more likely to keep the consumption the same as now.

Pork

Age/Consumption	*More than now*	*Less than now*	*About the same*
Less than 25 yrs	-	6	19
25 - 30 yrs	-	21	13
31 - 35 yrs	-	9	13
More than 35 yrs	5	9	15

Note: The no response percentage should be added to the rows to make total 100%

It does not appear that consumption of pork would increase by any significant proportion in the forthcoming year, however the only significant increase seem to be with the 5% of respondents in the age group above 35 years. However, with respect to decrease in consumption of pork 21% of the respondents in the age group of 25 - 30 years said they would reduce their consumption.

Mutton

Age/Consumption	*More than now*	*Less than now*	*About the same*
Less than 25 yrs	-	13	13
25 - 30 yrs	13	15	18
31 - 35 yrs	6	3	21
More than 35 yrs	3	10	21

Note: The no response percentage should be added to the rows to make total 100%

It is seen that mutton is not becoming popular within the younger age group of less than 25 years of age with none of them perceiving an increase in their consumption of mutton in the forthcoming year. The only significant perceived increase is in the age group of 25 - 35 years where an average of 10% of them said that they may increase the consumption of mutton next year.

In the case of wildboar, duck, turkey, lamb and rabbit the age group analysis does not indicate any particular group perceiving any significant increases or decreases in their purchase habits in the forthcoming year due to sample sizes being too small.

Fish

Age/Consumption	*More than now*	*Less than now*	*About the same*
Less than 25 yrs	19	6	56
25 - 30 yrs	33	15	28
31 - 35 yrs	27	4	48
More than 35 yrs	30	20	38

Note: The no response percentage should be added to the rows to make total 100%

Soya Meat

Age/Consumption	*More than now*	*Less than now*	*About the same*
Less than 25 yrs	13	6	6
25 - 30 yrs	13	3	36
31 - 35 yrs	11	6	31
More than 35 yrs	16	8	27

Note: The no response percentage should be added to the rows to make total 100%

In the case of fish, it was those between the ages of 25 - 30 years (33%) and those above 35 year (30%) who mentioned of a significant increase in their fish consumption for the following year. Further, even in the other age groups of above 30 years there is at least 29% that perceive an increase in fish consumption.

Soya meat too demonstrated high ratings only in respect to the category of unchanged consumption for the next year with 36% between the ages of 25 - 30 years and 31% between 31 - 35 years saying so. 16% of the above 35 years group was the highest proportion for consumption increase seen for soya meat.

4.2.2.6 Future consumption pattern by Income by type of meat

Beef-consumption in the future

Trend/Income	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
More than now	23	16	25	33
Less than now	13	29	33	24
About the same	20	23	17	38

Note: The no response percentage should be added to the columns to make total 100%

Chicken- consumption in the future

Trend/Income	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
More than now	21	12	19	15
Less than now	19	32	38	18
About the same	56	46	36	51

Note: The no response percentage should be added to the columns to make total 100%

Pork- consumption in the future

Trend/Income	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
More than now	2	3	5	3
Less than now	7	14	11	8
About the same	10	15	7	22

Note:The no response percentage should be added to the columns to make total 100%

Mutton - consumption in the future

Trend/Income	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
More than now	2	4	6	33
Less than now	8	10	15	7
About the same	25	17	12	27

Note: The no response percentage should be added to the columns to make total 100%

Wild boar-consumption in the future

Trend/Income	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
More than now	-	1	3	-
Less than now	-	4	1	1
About the same	6	2	1	6

Note: The no response percentage should be added to the columns to make total 100%

Duck - consumption in the future

Trend/Income	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
More than now	-	1	1	-
Less than now	-	2	-	-
About the same	1	1	1	3

Note:The no response percentage should be added to the columns to make total 100%

Turkey -consumption in the future

Trend/Income	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
More than now	-	1	2	-
Less than now	-	2	-	-
About the same	2	1	-	2

Note: The no response percentage should be added to the columns to make total 100%

Lamb - consumption in the future

Trend/Income	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
More than now	-	1	1	-
Less than now	-	2	-	-
About the same	1	1	1	4

Note: The no response percentage should be added to the columns to make total 100%

Rabbit - consumption in the future

Trend/Income	Rs 3,500 - Rs 5,000	Rs 5,000 - Rs 7,500	Rs 7,500 - Rs 10,000	Over Rs 10,000
More than now	-	1	1	-
Less than now	-	2	-	-
About the same	-	1	-	1

Note: The no response percentage should be added to the columns to make total 100%

Fish - consumption in the future

Trend/Income	Rs 3,500 - Rs 5,000	Rs 5,000 - Rs 7,500	Rs 7,500 - Rs 10,000	Over Rs 10,000
More than now	35	30	36	22
Less than now	8	21	23	16
About the same	46	41	27	44

Note:The no response percentage should be added to the columns to make total 100%

Soya meat - consumption in the future

Trend/Income	Rs 3,500 - Rs 5,000	Rs 5,000 - Rs 7,500	Rs 7,500 - Rs 10,000	Over Rs 10,000
More than now	13	19	20	9
Less than now	4	10	14	3
About the same	39	30	21	24

Note: The no response percentage should be added to the columns to make total 100%

The above set of tables indicate the likelihood of participants to consume more or less of different types of meat analyzed separately for each income group.

The highest proportion of respondents who are likely to eat more beef in the near future are in the lower middle class group of Rs 3,500 - Rs 5,000, while those who are likely to eat less beef are in the higher income groups of more than Rs 7,500.

The above pattern is clearer for chicken, with 21% of the low income group mentioning they will consume more chicken in the next year as compared to the 15% of those above the over Rs 10,000 income group. Furthermore, the proportion of those in the Rs 5,000 - Rs 10,000 income group who expects to eat less chicken is approximately 35% while the same for the lower income group is only 19%.

However, the opposite of the above was seen for pork, where the higher income groups said that they are more likely to eat more pork while the lower income groups were more likely to eat less pork in the forthcoming year. With respect to mutton, no significant pattern was observed with changes in household income.

For wild boar, there is once again a slight trend towards the high income groups increasing their consumption. However, with respect to duck, turkey, lamb and rabbit this analysis could not be done due to the lack of coverage of regular consumers of these meats.

Fish and soya meat also did not show a particular trend with increasing income except that the middle income group of Rs 5,000 - Rs 10,000 was found to be more likely to increase their consumption.

4.2.2.7 *Future consumption pattern by religion of respondents*

The changes in the forthcoming consumption patterns among the consumers of each type of meat and with respect to the respondents respective religion is considered in the following set of tables.

Beef - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now	1	12	9	6
Less than now	8	29	19	
About the same	12	36	51	

Note: The no response percentage should be added to the columns to make total 100%

It was seen that the majority of the changes in consumption for the forthcoming year with respect to beef seemed to be dominated by Christians and Muslims. While 12% of Christians and 9% of Muslims mentioned they would increase their consumption, only 1% of Buddhists said so. For Buddhists, the majority of 79% were non-consumers of beef while it was 23% and 21% for Christians and Muslims respectively.

Chicken - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now	13	25	19	6
Less than now	29	20	16	25
About the same	49	46	56	50

Note: The no response percentage should be added to the columns to make total 100%

In the case of chicken, it was interesting to note that the majority of over 90% of Buddhist, Christians and Muslims eat chicken while the proportion is slightly lower for Hindus at 81%. Even though the respective percentages obtained by the Buddhists and Christians with respect to non-consumption proved to be almost the same, it was the Christian respondents who expected to see an increase in their consumption of chicken with 25% saying so, followed by 19% Muslims also expecting to eat more chicken in the forthcoming year.

Pork - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now	2	8		
Less than now	5	24		
About the same	10	29	2	

Note: The no response percentage should be added to the columns to make total 100%

As expected, pork proved to be very unpopular among Muslims due to religious reasons. The only potential market for pork seem to be the Christians where 29% said they will continue to consume at the same levels, where as it was only 10% for Buddhists.

Mutton - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now	2	6	7	-
Less than now	10	10	9	13
About the same	17	22	42	31

Note: The no response percentage should be added to the columns to make total 100%

Interestingly, the highest preference for mutton is seen among Muslims and Hindus, followed by Christians, and are all more inclined than Buddhists to consume more mutton in the future. While 71% of Buddhists said they do not consume mutton, only 42% of Muslims stated so.

Wild boar - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now	1	1	-	-
Less than now	1	3	-	-
About the same	1	10	2	-

Note: The no response percentage should be added to the columns to make total 100%

Duck - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now		2	-	-
Less than now		2	-	-
About the same	1	3	2	-

Note: The no response percentage should be added to the columns to make total 100%

Turkey - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now	1	2	-	-
Less than now	-	2	-	-
About the same	1	4	-	-

Note: The no response percentage should be added to the columns to make total 100%

Lamb - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now		2		
Less than now		2		
About the same	1	5		

Note: The no response percentage should be added to the columns to make total 100%

Rabbit - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now	-	2	-	-
Less than now	1	2	-	-
About the same	1	2	-	-

Note: The no response percentage should be added to the columns to make total 100%

For wild boar, duck, turkey, lamb and rabbit, the only potential target group with respect to religion seem to be the Christians with an average of around 6% saying they will continue the same amount of consumption or eat more in the near future.

Soya meat - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now	16	13	2	25
Less than now	9	4	5	
About the same	30	26	19	19

Note: The no response percentage should be added to the columns to make total 100%

Fish - consumption in the future

Trend/Religion	*Buddhist*	*Christian*	*Islam*	*Hindu*
More than now	25	42	26	13
Less than now	20	9	19	25
About the same	44	35	35	44

Note: The no response percentage should be added to the columns to make total 100%

While almost the same proportions of Buddhists, Christians, Muslims and Hindus do not consume fish, a high proportion of Christians, 42%, show a liking to eat more fish in the near future than any other religious group.

It was found that while Muslims seem to reject soya meat, Buddhists have the highest proportion of consumers with 55%, and Hindus with a current consumption rate of 44% has the highest potential for the future with 25% of them saying they will consume more soya meat in the future.

4.3 Preferences for Meat types

4.3.1 Order of Preference

In the following question the respondents were asked to select their most preferred to least preferred types of meat. The reasons for these preferences are analyzed later. The table gives the proportion of people who selected a particular meet as most preferred, 2nd most preferred... least preferred etc.

Preferences: first, second, third and the least preferred

Kind of meat	*1st pref.*	*2nd pref.*	*3rd pref.*	*least pref.*	*No answer/ do not consume*
Beef	18	13	6	22	41
Chicken	53	27	7	1	12
Pork	5	5	9	23	58
Mutton	4	10	11	3	72
Wild Boar	2	1	1	1	95
Duck	-	-	-	2	98
Turkey	1	-	-	2	97
Lamb	-	-	-	3	97
Rabbit	-	-	-	15	85
Soya Meat	3	5	12	5	75
Fish	14	21	14	1	50

** Preferences does not necessarily mean that the respondents have tried that meat before, but is also based on perceptions of that meat*

When looking at the tables relating to the consumer preference level towards the respective meat/fish types, beef did not seem to be the most preferred type of meat by the majority. Only 18% rated beef to be their most preferred type of meat followed by 13% and 6% who rated beef as their second and third preferences respectively. Furthermore a high proportion of 22% regarded beef to be their least preferred type of meat.

In comparison to beef and other competing types of meat chicken proved to be the most preferred type of meat in the Sri Lankan household. This was so as a majority of 53% rated it to be the most preferred thereby ensuring the popularity and the importance of chicken as a key item in the respective household meal. Furthermore another 27% mentioned chicken to be their second most preferred type of meat while only 1% consider it to be the least preferred. One of the probable reason for the popularity of chicken among many consumers could be its wide availability besides other social, religious and cultural reasons with respect to other meats which are identified in this study.

Pork however failed to be a much preferred meat by the majority with 23% rating it to be their least preferred type of meat. Only 5% considered pork to be their most preferred. Certain health and religious reasons being the reasons for the above outcome. While a total of only 28% of the respondents gave some preference rating for mutton, only 4% considered it to be the most preferred type of meat. Such a low rating could be the outcome of the unfamiliarity of the product, high price and doubts regarding the source of the meat itself. However, considerable proportions of 10% and 11% considered mutton to be their second and third most preferred type respectively.

Wildboar being another rare an unknown type of meat was rated quite low with only 2% rating it as their most preferred type of meat. With respect to duck, turkey, lamb and rabbit the ratings cannot be analyzed since only a very few respondents had tried them to give a particular ranking. However, for rabbit it should be noted that a significant 15% rated it as their least preferred type of meat.

Soya meat which a meat subsidy even though consumed by a considerable proportion of the sample do not appear to be very popular with only 3% stating this as their most preferred. However, 5% and 12% selected soya meat as their second and third preferred respectively while only 5% stated it as their least preferred. It was also mentioned by some that the preference for soya meat can be increased if they come in different meat flavours such as chicken, mutton etc. However, if actual meat flavours are used soya meat will not be used by the vegetarians who are in fact the majority of soya meat consumers.

Fish seems to be quite popular among the Sri Lankan household with 14% stating that fish is the most preferred while 21% and 14% rating it as their second and third preferred. Only 1% claim fish to be their least preferred.

4.3.2 Profiles of Consumers of Different Types of Meat

4.3.2.1 Most preferred meat by gender

1st number : *percentage breakdown of those who most preferred the type of meat by the demographic group*

(2nd number) : *Of all the respondents in the particular demographic group the proportion who selected this type of meat as their most preferred*

Gender / Most preferred meat	*Male*	*Female*
Beef	58 (21)	42 (15)
Chicken	47 (50)	53 (56)
Pork	59 (5)	41 (4)
Mutton	47 (4)	53 (4)
Wild Boar	100 (4)	-
*Duck	-	-
Turkey	-	-
*Lamb	-	-
*Rabbit	-	-
Soya Meat	62 (3)	38 (2)
Fish	43 (12)	57 (16)

** Sample size is too small*

When considering the most preferred type of meat in accordance to the gender, it was seen that 58% of those who mentioned their most preferred type of meat to be beef were males. With respect to chicken, it could be concluded that there was a higher preference for chicken by the females with 56% of them claiming chicken is their most preferred while only 50% of males claimed so.

While wild boar seems to be a predominantly males' type of meat, pork had a 59:41 and mutton had a 47:53 male to female ratios indicating pork is more preferred by males while mutton is slightly more preferred by females.

With respect to duck and lamb no significant difference was seen between males and females. However, on turkey and fish, the highest preference was among females.

4.3.2.2 Most preferred meat by Age

1st number : *percentage breakdown of those who most preferred the type of meat by the demographic group*

(2nd number) : *Of all the respondents in the particular demographic group the proportion who selected this type of meat as their most preferred*

Income / Most preferred meat	*Less than 25*	*25 - 30 yrs*	*31 - 35 yrs*	*More than 35*
Beef	4 (13)	16 (31)	19 (21)	61 (16)
Chicken	4 (50)	7 (39)	17 (56)	72 (54)
Pork	10 (13)	10 (5)	6 (1)	74 (5)
Mutton	5 (6)	-	21 (6)	74 (4)
Wild Boar	11 (6)	-	11 (1)	78 (2)
*Duck				
Turkey	-	-	17 (1)	83 (2)
*Lamb				
* Rabbit				
Soya Meat	-	19 (5)	-	81 (3)
Fish	3 (6)	10 (15)	15 (13)	72 (14)

** Sample size is too small*

From the above tables, it can be seen that a considerable proportion of 31% of those between 25-30 years and 21% of those between 31-35 years rated beef as being their most favourite. However, the preference levels for beef among the youngest group of below 25 years and the older consumers of above 35 years was lower.

When considering chicken, the results clearly show that a considerable percentage (at least 50%) of respondents within all age groups seem to prefer chicken, ensuring it to be a highly common feature among Sri Lankan households.

13% of the respondents of those less than 25 years old rated pork as their most preferred meat. However, it should be noted that the respondents with high preference for pork of the remaining age groups were very negligible with less than 5% each. This seems to indicate a preference for pork among the younger consumers.

There was no significant difference between the preference levels for mutton in all the age groups except for those in the 25-30 year age group.

In the case of wildboar, turkey, lamb and rabbit it should be mentioned that almost none of the respondents considered these meats as their most favourite and hence this analysis was not done.

While with respect to soya meat there was no significant pattern with respect to age, in the case of fish, the older consumers seem to prefer it more almost twice as more than the younger consumers.

4.3.2.3 Most preferred meat by Income

1st number : *percentage breakdown of those who most preferred the type of meat by the demographic group*

(2nd number) : *Of all the respondents in the particular demographic group the proportion who selected this type of meat as their most preferred*

Income / Most preferred meat	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
Beef	17 (17)	23 (18)	20 (16)	40 (20)
Chicken	21 (60)	28 (61)	23 (55)	28 (43)
Pork	18 (5)	18 (4)	32 (7)	32 (4)
Mutton	10 (1)	7 (4)	21 (3)	62 (7)
Wild Boar	-	-	-	-
* Duck	-	-	-	-
Turkey	-	-	25 (1)	75 (2)
* Lamb	-	-	-	-
* Rabbit	-	-	-	-
Soya Meat		25 (3)	18 (2)	57 (4)
Fish	20 (16)	19 (11)	19 (11)	42 (16)

** Sample size is too small*

Out of those who rated beef as their most preferred meat, a significant 40% consisted of those earning more than Rs 10,000 a month while 23% were earning between Rs 5,000 and Rs 7,500 a month. However, for that of chicken, the highest preference was associated with the respondents in the middle income categories of Rs 3,500 - Rs 10,000 with an average rating of 58%. The respective rating given for chicken by the highest income group was only 43%. In the case of pork, there was no significant difference between the preference levels given by the different income groups.

In the case of mutton, there seem to be an increasing preference with income, with the highest preference given by the very high income category of over Rs 10,000 per month. Generally it could be seen that it was the respondents earning more than Rs 10,000 who demonstrated a very high preference for mutton, followed by beef.

Turkey, being quite unavailable and a high priced meat, proved to be the most preferred only among the very high income classification. Of the very few who rated turkey as the most preferred, 75% belonged to the more than Rs 10,000 a month group, indicating that price maybe a reason for the unpopularity of turkey among the not so affluent.

Soya meat, with its high nutritional value and low price was most liked by the respondents of the middle and upper income groups, over the low income groups. A reason for this could be the awareness of its nutritional value by the respondents who preferred it. With reference to fish too the high preference was seen among respondents in the high income groups. In the over Rs 10,000 per month, 42% rated fish as their most preferred.

4.3.2.4 Most preferred meat by Religion

1st number : *percentage breakdown of those who most preferred the type of meat by the demographic group*

(2nd number) : *Of all the respondents in the particular demographic group the proportion who selected this type of meat as their most preferred*

Income / Most preferred meat	*Buddhist*	*Christian*	*Muslim*	*Hindu*
Beef	25 (8)	44(25)	31(61)	-
Chicken	65(63)	24(40)	5(26)	6(75)
Pork	43(3)	57(8)	-	-
Mutton	53(4)	21(3)	21(9)	5(6)
Wild Boar	56(2)	44(3)	-	-
* Duck				
Turkey	-	100(4)	-	-
* Lamb				
*Rabbit	-	100(1)	-	-
Soya Meat	54(3)	30(3)	8(2)	8(6)
Fish	55(15)	30(15)	10(7)	5(6)

** Sample size is too small*

When looking at the tables it is clear that it was the Muslims followed by Christians who considered beef to be their most preferred type of meat. This was seen when comparing the rating of 61% given by Muslims, 25% given by Christians and the negligible 8% given by Buddhists.

Chicken being the most common type of meat among many Sri Lankan households, preference was greatly seen among Buddhists and Hindus, where 63% Buddhists and 75% Hindus rated chicken as their most preferred. Furthermore, 40% of Christians and 26% of Muslims rated chicken as their most favourite.

Pork appeared to be not so popular as chicken with none of the Muslim or Hindu respondents rating it as their most preferred. Highest preference for pork was seen only among the Christians (8%). When considering mutton, preference was almost equal among all religious groups, led by the Muslims where 9% rated it as their most preferred.

Wild boar was considered as their most preferred by a very small proportion which includes 3% Christians and 2% Buddhists. With respect to turkey and rabbit it was only the Christians who regarded these with high preference.

4.3.2.5 Least preferred meat by gender

1st number : *percentage breakdown of those who most preferred the type of meat by the demographic group*

(2nd number) : *Of all the respondents in the particular demographic group the proportion who selected this type of meat as their most preferred*

Gender / Least preferred meat by gender	*Male*	*Female*
Beef	48(21)	52(23)
Chicken*	60(1)	40(1)
Pork	50(23)	50(23)
Mutton	43(3)	57(3)
Wild Boar		100(1)
Duck*	50(2)	50(2)
Turkey	38(1)	63(2)
Lamb	55(3)	46(2)
Rabbit	48(15)	49(15)
Soya Meat	57(5)	44(4)
Fish*	25	75(1)

** Sample size is too small*

Of those who said mutton is their least preferred 57% were females while for turkey it was 63% females. Males seem to have a dislike for chicken, lamb and soya meat more than the females.

4.3.2.6 Least preferred meat by Age

1st number : *percentage breakdown of those who most preferred the type of meat by the demographic group*

(2nd number) : *Of all the respondents in the particular demographic group the proportion who selected this type of meat as their most preferred*

Income / Least preferred meat	*Less than 25*	*25 - 30 yrs*	*31 - 35 yrs*	*More than 35*
Beef	4 (19)	10 (23)	13 (18)	73 (23)
Chicken*	50(13)			50 (1)
Pork	6(25)	8 (15)	23 (32)	63 (21)
Mutton		9(3)	32 (6)	59 (2)
Wild Boar		-	33 (1)	67 (2)
Duck*				100(3)
Turkey	-	17(3)	29 (3)	54 (1)
Lamb				
Rabbit				
Soya Meat	-	8 (3)	-17(4)	75 (5)
Fish*			50 (1)	50

** Sample size is too small*

Out of the 110 respondents who considered, beef to be the least preferred form of meat, 73% were within the age group of respondents above 35 years, indicating that beef is not liked by the older consumers. With respect to pork and mutton too those who disliked were majority in the middle ages of above 30 years. Once again, chicken was not analyzed here since there were not enough respondents who said chicken is their least preferred. Further, this analysis was not done for other meat types due to insufficient coverage of consumers of these meats.

4.3.2.7 Least preferred meat by Income

1st number : *percentage breakdown of those who most preferred the type of meat by the demographic group*

(2nd number) : *Of all the respondents in the particular demographic group the proportion who selected this type of meat as their most preferred*

Income / Least preferred meat	*Rs 3,500 - Rs 5,000*	*Rs 5,000 - Rs 7,500*	*Rs 7,500 - Rs 10,000*	*Over Rs 10,000*
Beef	24 (29)	21 (20)	18 (17)	37 (22)
Chicken*		20 (1)		80 (2)
Pork	22 (29)	21 (21)	30 (31)	27(18)
Mutton		43 (5)	29 (4)	28 (2)
Wild Boar	34 (1)		33 (1)	33 (1)
Duck*	20(2)	20(2)	20 (2)	40 (2)
Turkey			37 (3)	63 (3)
Lamb	9(1)	18(2)	18(2)	55(4)
Rabbit	16(14)	29(19)	25(16)	30(13)
Soya Meat		10(2)	28(6)	62(8)
Fish*	37(1)			63 (1)

** Sample size is too small*

110 (22%) respondents out of the 500 who were surveyed, considered beef to be the least preferred form of meat. Accordingly, out of the 110 respondents, 37% were in the income group of above Rs. 10,000, while only 24% belonged to the income group of Rs.3500 - Rs.5000. Once again, we see a rejection of beef among those in the high income groups. In the case of chicken, only 5 respondents stated chicken as their least preferred meat form and of those 80% belonged to the income group of above Rs.10,000.

With respect to pork, 22% of the respondents regarded pork as their least preferred form of meat. The lowest ratings for pork were associated with the lower income groups of below Rs.7500. The high income groups seem to accept pork more than the low and middle income groups.

Mutton had only 14 respondents who appeared to really dislike it, of which 43% were within the income group of Rs.5000 - Rs.7500. The proportion of those who dislike mutton the most seem to be decreasing with increasing income.

With regard to wildboar, duck, turkey and lamb this analysis was not done due to insufficient coverage of respondents who have consumed these meats often enough to be able to rate them. However, there were 73 (15%) of respondents who stated rabbit as their least preferred meat, with 30% of them in the income group of above Rs.10,000 while 29% were in the income group of - - Rs.5000 -Rs.7500. Finally, for soya meat rejecters seem to be majority (62%) of the high income group of above Rs. 10,000, while for fish this analysis was not done due to insufficient coverage of those who do not like fish.

4.3.2.8 Least preferred meat by Religion

1st number : *percentage breakdown of those who most preferred the type of meat by the demographic group*

(2nd number) : *Of all the respondents in the particular demographic group the proportion who selected this type of meat as their most preferred*

Income / Least preferred meat	*Buddhist*	*Christian*	*Muslim*	*Hindu*
Beef	82(33)	12(8)	1(2)	5(31)
Chicken	60(1)	40(1)		
Pork	48(20)	16(12)	32(80)	4(19)
Mutton	36(2)	64(5)		
Wild Boar	67(1)	33(1)		
Duck				
Turkey	-		-	-
Lamb				
Rabbit	-		-	-
Soya Meat	4 (0)	96(15)		
Fish	25 (0)	50(1)	25(2)	

Beef is rejected mostly by Buddhists and Hindus since 82% of respondents who mentioned beef to be the least preferred meat, were Buddhists. Further, 33% of all Buddhists and 31% of all Hindus said they completely reject beef.

Least preference for pork was given by 20% of Buddhists and 80% of Muslims. Furthermore, of those who completely rejected pork 32% were Muslims and 48% were Buddhists.

While rejection of mutton was low among all religious groups, of the 14 respondents who perceived mutton as their least preferred, a majority of 64% were Christians while 36% were Buddhists.

All other meat types such as lamb, duck, turkey and rabbit were not analyzed since the number of respondents that completely rejected these meats were small due to lack of regular use.

4.3.3 *Consumption of Non-traditional Meats*

Please tell me whether you have ever eaten the following types of meat and if you have, what is your general opinion about it?	*Duck*	*Rabbit*	*Turkey*	*Lamb*	*Wild Boar*
Never tried it, but would like to try	19	14	21	18	14
Never tried it, and would not like to try	59	64	53	57	49
Tried it and think it is tasty	15	13	18	17	29
Tried it and did not like the taste	7	9	8	8	8

Potential for trying out non-traditional types of meat

please tell me whether you are likely to try the following types of meat in the coming year even though you have never eaten some of them up to now?	*Duck*	*Rabbit*	*Turkey*	*Lamb*	*Wild Boar*
Never tried it, but might try	18	14	18	16	10
Never tried it, and would not like to try	58	63	54	56	50

The general opinion about the non traditional meat of duck was varied with a significant proportion of the sample, 59% stating their unwillingness to try out duck meat. However, 19% of the respondents mentioned that they were willing to try it despite the fact that they have never consumed before. The opinion of 15% of the sample was that duck was a tasty meal thereby creating a potential demand for same.

In the case of rabbit too, as with duck, a majority of 64% firmly stressed on the disapproval towards the meat type by stating they have never tried it and they will never try it either. Out of the remainder only 14% were willing to try out rabbit meat. It should be noted a further 13% agreed that rabbit was a tasty meal.

With respect to turkey, like in the case of duck and rabbit the general opinion of the majority was more oriented towards the non consuming category. With 53% of those surveyed stressing that they would not try turkey. However, 21% of those surveyed were willing to trying the meat while 17% considered turkey to be a tasteful type of meat.

Lamb being another type of meat that Sri Lankans are unfamiliar with was disapproved by a majority of 57%. However, while 18% of the respondents stated that they were willing to try lamb a further 17% considered lamb to be tasty type of meat. Considering wildboar with respect to taste, 29% demonstrated their approval of good type of meat which is much prior than the approval ratings on the other non traditional types of meat. An important feature in the case of wildboar was that unlike the other rare meats wildboar was discarded by less than 50% who were not willing to try.

Overall, of the non-traditional meats considered, wild boar seem to have the highest potential at this point in time, with 43% mentioning they would like to try or that they have tried and like the taste. The next highest potential seem to be for Turkey. Lamb and duck have lower potential with 65% and 66% completely rejecting it while rabbit has the lowest potential with 73% completely rejecting this meat.

4.3.3.1 Reasons for not trying non-traditional types of meat

To obtain the following analysis, the respondents were asked whether they have ever consumed any non-traditional meat types such as duck, rabbit, turkey, lamb and wildboar. If they have consumed these meat types then they were questioned about their opinion and the likelihood to consume in the future and if they have not consumed up to now the reasons for this was questioned.

Reason/Type	*Duck*	*Rabbit*	*Turkey*	*Lamb*	*Wild Boar*	*Pork*	*Beef*
Don't like the taste	3	3	3	3	8	16	10
Never tried it, and would not try because of that (unfamiliarity)	60	49	58	60	54	43	35
Think it is a sin	10	28	6	5	9	13	31
Not available	21	14	21	19	20	21	2
Too expensive	3	2	9	9	1	2	2
Other	3	4	3	4	8	5	20

When the 500 respondents, were questioned about their attitudes and perceptions towards the meat form duck, a considerable proportion of 78% claiming they are non-eaters of duck and are unwilling to taste the meat form, could be an indication to the lack of potential demand for the meat form. However, the remainder consisting to be 18%, did demonstrate a liking to try the meat form even though they had not tried it before As for reasons for not eating duck, 60% of them stated unfamiliarity as the reason while 10% thought it is a sin and 21% mentioned it is due to unavailability. Only 10% mentioning the sin factor for duck as compared to 31% for beef and 28% for rabbit may be an indicator for higher potential for duck than the beef and rabbit.

When considering the potential demand for rabbit, it could be emphasized only a 19% of the respondents appeared to show some preference towards the trying out of the meat form. Of the people who are not willing to try a majority of 49% stated unfamiliarity as the main reason, while a 28% thought it is a sin, 14% mentioned it is due to unavailability. The sin factor with respect to rabbit is more prominent than that for duck.

Looking at the future for Turkey, it is seen that only 23% were willing to try the meat form. For this meat type too the main reasons given for not trying Turkey were again unfamiliarity (58%) and unavailability (21%). The sin factor was not significant here with only 6% claiming sin as a reason for refraining from eating turkey. Lamb too like the above discussed meat forms, namely, rabbit and duck, demonstrated to be quite unpopular among the Sri Lankan households. A significant 56% showed their disapproval towards the meat, while only a 16% demonstrated some liking towards the meat by stating that they would like to try lamb.

With respect to wild boar, the proportion of people who are willing to try this meat in the future is higher than that for the other non-traditional meats such as lamb, rabbit, turkey etc. However, a proportion of 65% who have not tried and are not willing to try wildboar is once again a high proportion. The main reasons for not trying this meat were unfamiliarity, sin and unavailability.

4.3.4 Non-Consumption of Pork and Beef

Since it is known that a significant proportion of Sri Lankans either do not consume beef and pork or even those who eat are on a trend of giving up these two items from their menus, the respondents were also questioned about this choice and the results are given below.

Of the 500 respondents, a majority of 55% disliked and stated unwillingness to taste pork in the future. Out of the non-pork consumers, unfamiliarity towards the product could be regarded to be a prominent factor that stops them from eating pork since 43% of them stated they do not eat pork due to this reason. This unfamiliarity was explained as somewhat of a tradition where they always used to not bring pork to their house for generations mainly for religious reasons. It seems like this 'tradition' was started by the older generations mainly in Buddhist houses with relation to lighting the lamp in the house, however, the younger generations seem to continue this as a habit most of the time unaware of its' roots. In the case of Muslims the reason was purely religious. This is also seen with 13% of the non-consumers stating the sin-factor as the reason for refraining from pork. Other reasons for the lack of preference for pork was seen to be due to its' taste (16%), unavailability (21%) and high price (2%).

In the case of beef, 51% of all respondents indicated a dislike and unwillingness to taste beef in the future. When we inquired about the reasons behind this rejection of beef, 35% indicated unfamiliarity with the meat as the main reason while a high proportion of 31% stated they thought eating beef is a sin. This sin factor seem to be a much more dominating aspect for refraining from beef consumption than with the other meats. The unfamiliarity was explained somewhat similarly to pork where the respondents said they always used to refrain from bringing beef to the house since their parents never did it either. The original reasons behind this habit among the older generations are more religious than cultural in the Buddhist homes where most of the older generations also believe in the Hindu gods. However, now it has become more of a cultural reason where people of all religions think it is a sin to kill this species since we use cow's milk and use the bull in the paddy fields and on carts. With the younger generation, it seems the reasons are more social as well as cultural where some of them believe that it has now almost become anti-cultural to eat beef, and hence they are following suit with the rest of the society.

4.4 Demand and Price Elasticity

In an attempt to determine the price elasticity of demand for the different types of meat, the respondents were asked the following question. "For the following types of meat, could you tell me how much on average you will be willing to pay, and the quantity you are willing to buy at this price?" Given below are summarized tables of the answers provided by the number of respondents in each price and quantity category.

Demand Schedule for Beef

Price/ Quantity	*1kg*	*2kg*	*3kg*	*4kg*	*5kg*	*6kg*	*7kg*	*8-10kg*
Less Rs.50	8	1						
Rs.50 - 55								
Rs.55 - 60	4		1		1			
Rs.60 - 65	1							
Rs.65 - 70	4				1			1
Rs.70 - 75	24	2	1	1	2			4
Rs.75 - 80	37	6	4	6	1			7
Rs.80 - 85	13	1		3	3	1		6
Rs.85 - 90	3	3	2	2	2	1	1	
Rs.90 - 95	2							
Rs.95 - 100	9	5			5			1

Demand Schedule for Chicken

Price/ Quantity	*1kg*	*2kg*	*3kg*	*4kg*	*5kg*	*6kg*	*7kg*	*8-10kg*
Less Rs.50	2							
Rs.50 - 55	2							
Rs.55 - 60	1		4					
Rs.60 - 65	1		3	2				
Rs.65 - 70								
Rs.70 - 75								
Rs.75 - 80	9	1		1	1			
Rs.80 - 85	6			3				2
Rs.85 - 90	31	3	2	1	2			5
Rs.90 - 95	26	1		3	3	1		9
Rs.100 - 105	63	37	17	7	17	7	2	12
Rs.105 - 110	20	3	4	5	3	5		2
Rs.110 - 115								
Rs.115 - 120	7	1	3	1		1	1	1
Rs.120 - 125	5		3	2				

Demand Schedule for Pork

Price/ Quantity	*1kg*	*2kg*	*3kg*	*4kg*	*5kg*	*6kg*	*7kg*	*8-10kg*
Less Rs.50								
Rs.50 - 55								
Rs.55 - 60	1							
Rs.60 - 65								
Rs.65 - 70					1			
Rs.70 - 75	1							
Rs.75 - 80	8							1
Rs.80 - 85	7			1				
Rs.85 - 90	12	3	1		1			
Rs.90 - 95	1							
Rs.95 - 100	17	10	6	5	5		1	
Rs.100 - 105	2							
Rs.105 - 110	10	2						
Rs.110 - 115	19							
Rs.115 - 120	1							

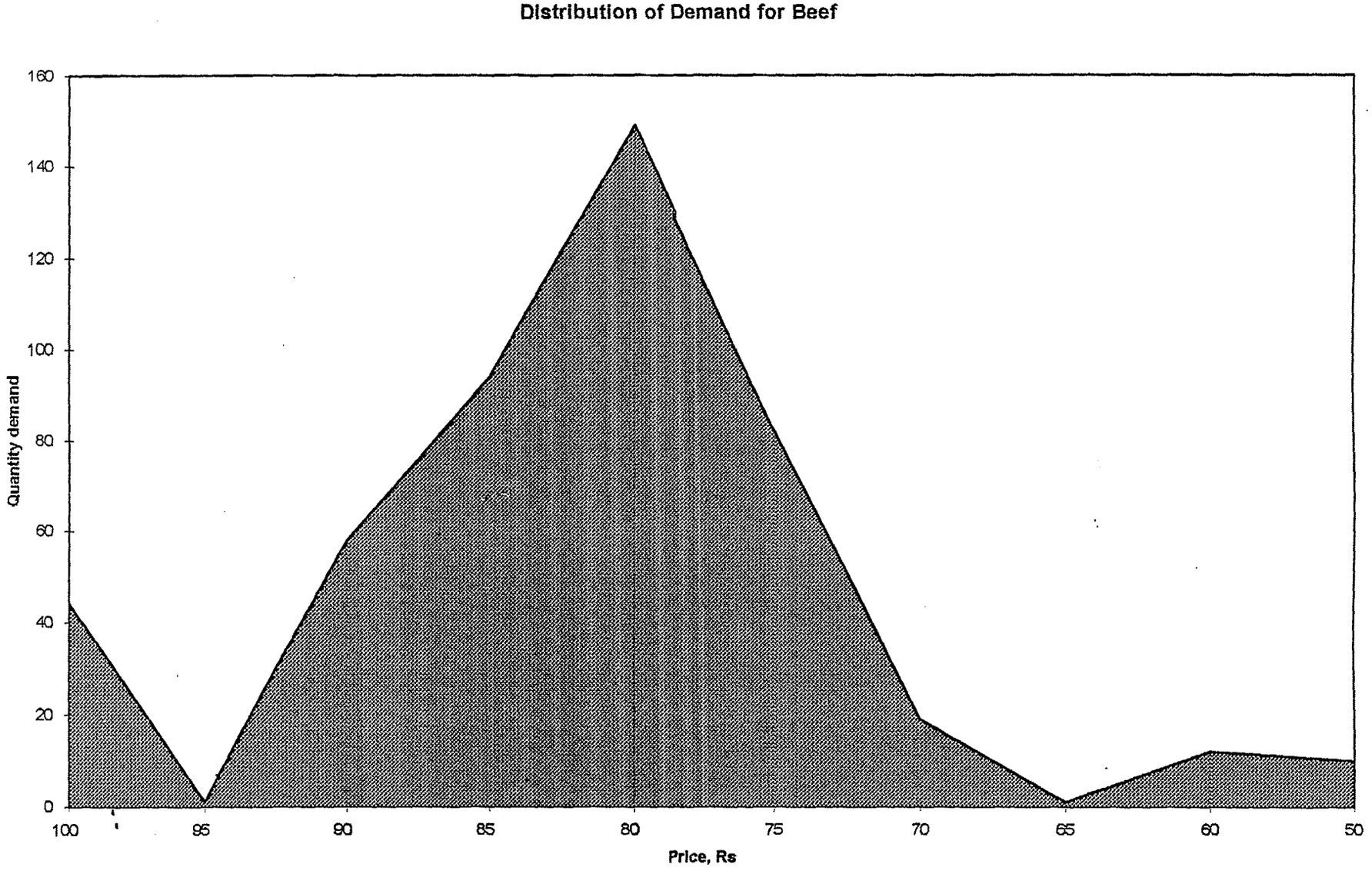
Demand Schedule for Mutton

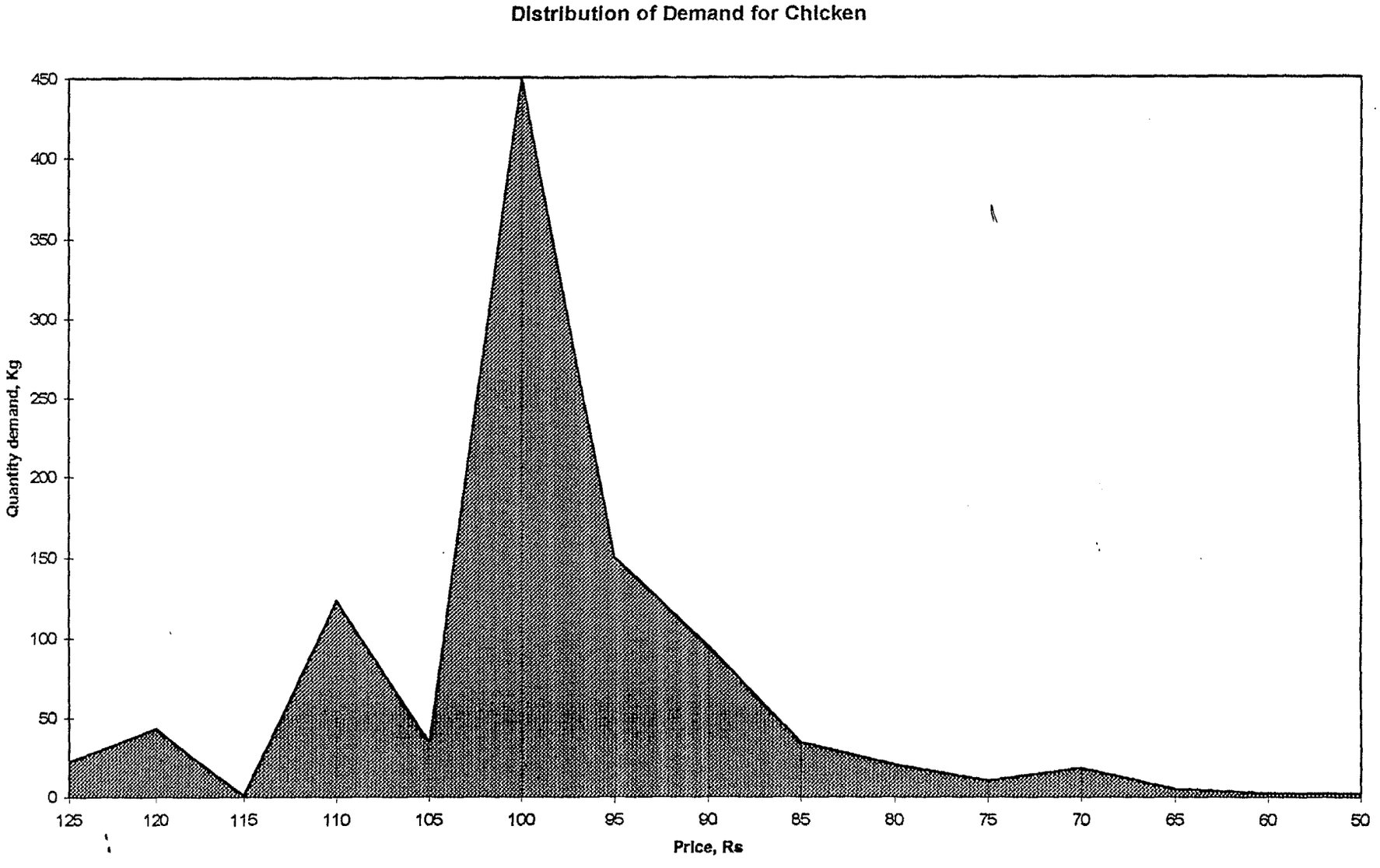
Price/ Quantity	*1kg*	*2kg*	*3kg*	*4kg*	*5kg*	*6kg*	*7kg*	*8-10kg*
Less Rs.100	4	3						
Rs.100 - 145	5	1			1			
Rs.145 - 150	2	8	3	2	1			
Rs.150 - 175	18	10	2	2	2		2	
Rs.175 - 200	40	10	3	1	3	1		

Taking in to consideration the above table depicting the demand schedules for the different types of meat and the graphs given in the following pages depicting the distribution of demand for same, it can be seen that most respondents indicated the most willingness to purchase beef in the region of Rs 75 to Rs 85 per kilogram, chicken in the region of Rs 85 - Rs 105 per kilogram, pork in the region of Rs 90 - Rs 115 and mutton in the region of Rs 200 per kilogram.

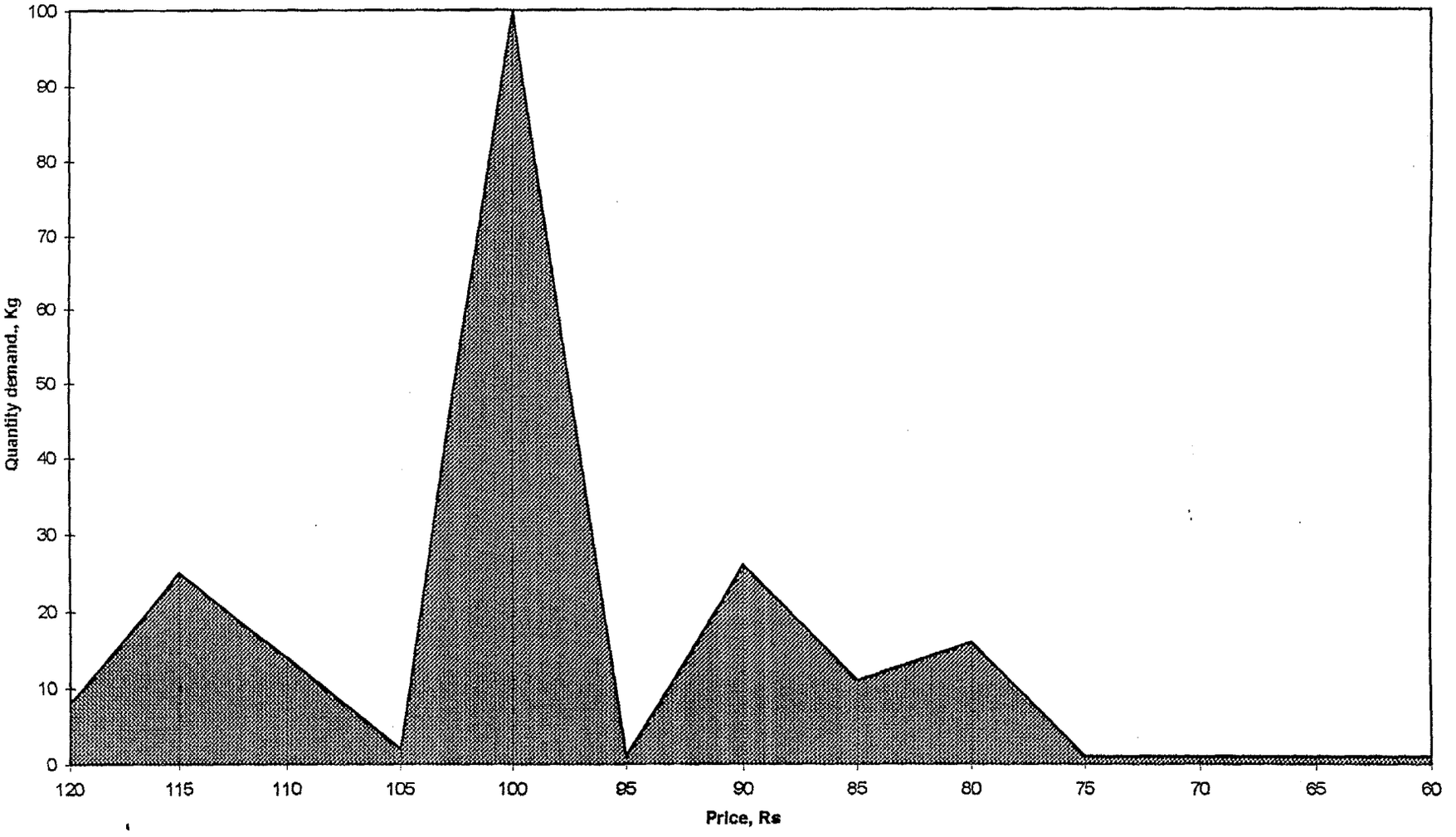
Price Elasticity of Demand

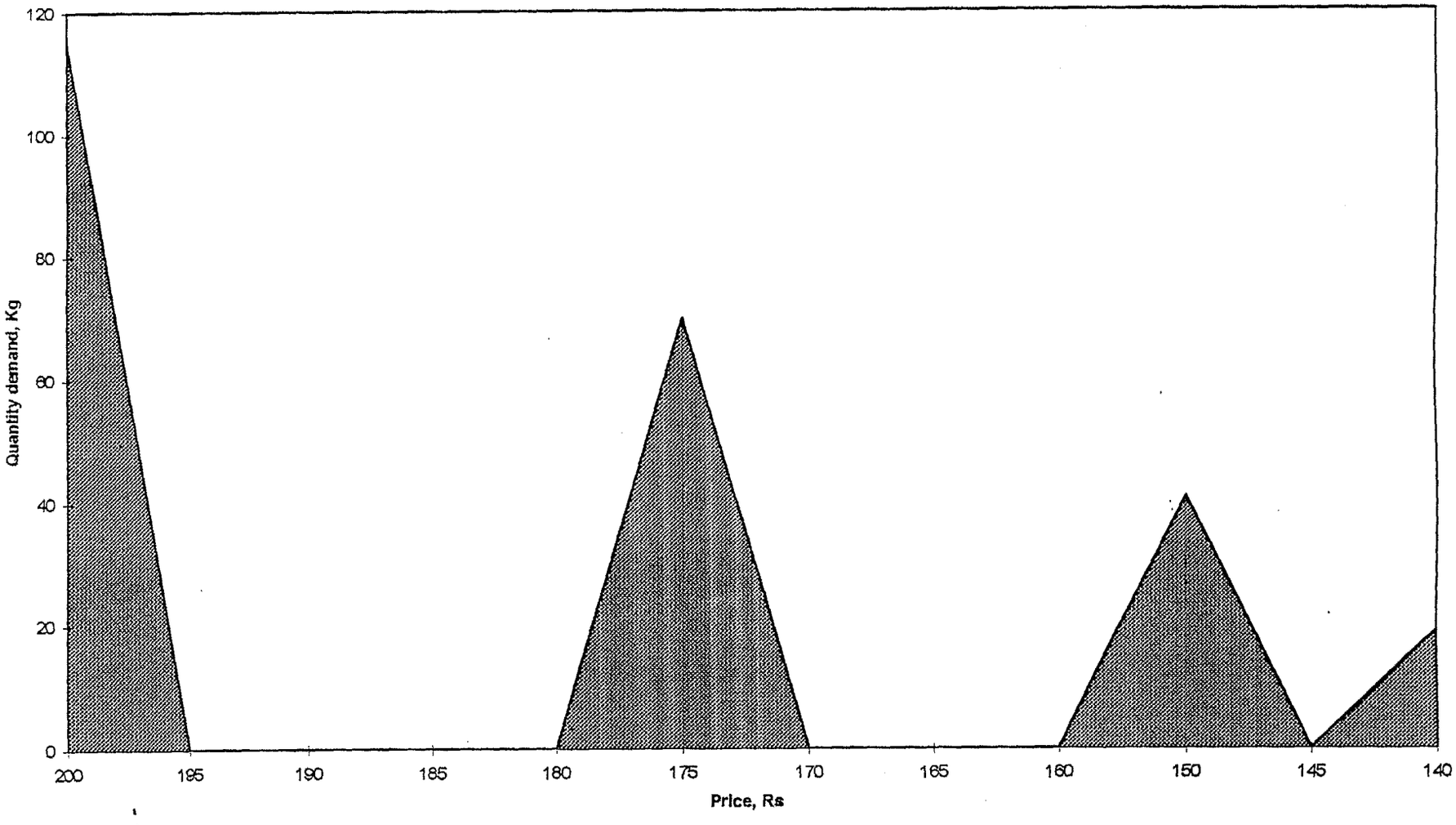
Elasticity of demand is a concept for measuring how much the quantity demanded of a particular product would change in response to a change in demand. Theoretically, if a percentage cut in price produces a larger percentage increase in quantity then that product is considered to be elastic, and if the change in quantity is smaller than the change in price it is said to be inelastic.


Distribution of Demand for Beef
Quantity demand
160
140
120
100
80
60
40
20
0
100
95
90
85
80
75
70
65
60
50
Price, Rs


Distribution of Demand for Chicken
Quantity demand, Kg
450
400
350
300
250
200
150
100
50
0
125
120
115
110
105
100
95
90
85
80
75
70
65
60
50
Price, Rs

Distribution of Demand for Pork




Distribution of Demand for Mutton
Quantity demand, Kg
120
100
80
60
40
20
0
200
195
190
185
180
175
170
165
160
150
145
140
Price, Rs

In the case of beef, chicken and pork the calculations made I ndicate that all three types of meat has a coefficient of price elasticity of demand that is much greater than one. This result signifies that the three types of meat considered is elastic to price, or that its demand by the target households could be more than proportionally increased by a reduction in its price. It appears that beef and chicken have almost similar elasticity coefficients while that for pork is higher. Explained in another way, the study finds that producers/sellers could reduce the price of beef, chicken and pork and yet expect a significant increase in revenue from the sale of same due to the expected increase in demand. Also found in the study is that these three types of meat are also associated with positive income elasticities of demand indicating a rise in demand with rising disposable incomes of the target respondent groups.

4.5 Demographics of Respondents

Health Diets

Are you or any member of your household on a health diet that is low in fat and low in cholesterol?	*Percentage*
Yes	32
No	68

When analyzing the tables above, it could be seen that out of the 500 participants in the target group who were interviewed, a considerable proportion of 68% stated that the respective individuals or any member of the household was not on a health diet i.e. low in fat and cholesterol as this could greatly influence once purchases of meat. However, a significant 32% stated that either them or another member of their household is on low fat or low cholesterol diet.

Gender

Gender	*Percentage*
Male	50
Female	50

Age of respondent

Age	*Percentage*
Below 25 yrs	5
25 - 30 yrs	10
31 - 35 yrs	17
More than 35 yrs	68

Total monthly income of household

Income	*Percentage*
Rs 3,500 - Rs 5,000	20
Rs 5,000 - Rs 7,500	23
Rs 7,500 - Rs 10,000	22
More than Rs 10,000	35

Area of residence

Area	*Percentage*
Colombo MC	38
Dehiwala	9
Mount Lavinia	6
Ratmalana	5
Moratuwa	8
Kotte	5
Battaramulla	5
Nawala	1
Nugegoda and suburbs	6
Wattala, Seeduwa, Peliyagoda, Kelaniya	17

Occupation of respondent

Occupation	*Percentage*
Farming/Animal Husbandry	1
Administration/ Management Position	14
Labourer/ Transport/ Carpentry	6
Clerical/ Secretarial	12
Trade	17
Production/ Factory works	2
Professional (Doctors, Lawyers, etc.)	6
Service Workers (Teachers, clergy etc.)	10
Others	10
Not employed	21

Number of children in household

No. of children	*Percentage*
1 child	16
2 children	37
3 children	19
More than 3 children	10
No children	18

Number of members in household

No. of members in household	*Percentage*
1-2	5
3-5	72
6-8	16
More than 8	7

Religion of respondent

Religion	*Percentage*
Buddhist	54
Christian	30
Muslim	9
Hindu	3

5.0 *SUMMARY CONCLUSIONS*

The study consisted of a 500 household survey conducted in the urban areas of Colombo and Gampaha, covering households with a monthly income of at least Rs 3,500 and also a series of focus group discussions conducted on the subject matter of the study. The sample which consisted of 50% males and 50% females had 20% of households with incomes between Rs 3,500 and Rs 5,000 and 35% households with incomes above Rs 10,000. The sample covered 54% Buddhists, 30% Christians, 9% Muslims and 3% Hindus and 68% of the respondents were above 35 years of age. The criteria for participation in the survey was that they belong to the above Rs 3,500 per month income group, are regular meat consumers and get involved in the decision of purchasing meat for the household.

The survey revealed that chicken is the most popular type of meat consumed by 95% of the households in the middle and upper income group urban households. The second was fish consumed by 74% of the households followed by soya meat consumed by 60% of the households. The second type of meat consumed by the most number of the target Sri Lankan households is beef, followed by mutton and pork. It should be noted that this does not indicate the quantity consumed for each type of meat but only the proportion of households that purchase the particular type of meat.

When it came to popularity, or the most preferred type of meat, chicken was again the winner rated as number one by 53% of the consumers followed by beef rated number one by 18% , fish by 14%, pork by 5%, mutton by 4%, soya meat by 3%, wildboar by 2% and turkey by 1%.

The beef lovers are majority males of age less than 35 years in the middle to upper income group, while the chicken lovers are majority females of over 35 years in the lower middle to middle income group. Furthermore, while pork is also preferred by majority males, mutton seem to be more of a female choice. Pork is more preferred by the younger consumers of less than 25 years while mutton was almost equally preferred by all age

groups. Both pork and mutton are consumed more by the high income group of above Rs 7,500 mainly due to its high price.

With respect to religion, it was found that chicken is preferred by majority Hindus and Buddhists, pork by Christians, mutton by Muslims, soya meat by Hindus and fish by Buddhists and Christians.

As for the amount of meat consumption in the household, 55% of the households consume less than 250g of beef per month while 34% of the houses consume more than 5Kg of chicken per month. For pork and mutton, 72% and 65% of the houses respectively consume less than 250g per month. More than 5Kg of fish per month is consumed by 23% of the houses while 13% consume less than 250g of fish per month. For individual consumption levels, while 5% claim to consume a very low level of less than 25g of meat per day, 53% claim to consume less than 100g and the highest 30% consume more than 125g of meat per day.

When asked about their willingness and ability to purchase meat, most respondents indicated their willingness to purchase beef in the region of Rs 75 to Rs 85 per kilogram, chicken in the region of Rs 85 - Rs 105 per kilogram, pork in the region of Rs 90 - Rs 115 and mutton in the region of Rs 200 per kilogram. In the case of these meats, it was found that their price elasticity of demand was much greater than one, indicating that its demand by the target households could be more than proportionally increased by a reduction in its price.

While the majority in all age groups said they consume almost the same amount of meat now as compared to an year ago, more of the less than 25 years old consumers claim they consume more now and are likely to increase their consumption in the future. The trend seems to be more or less stagnant with respect to consumption levels of 57% of all respondents that perceive no increase in their meat consumption in the future. However, 13% stated they are likely to eat more meat in the future. More females state they want to

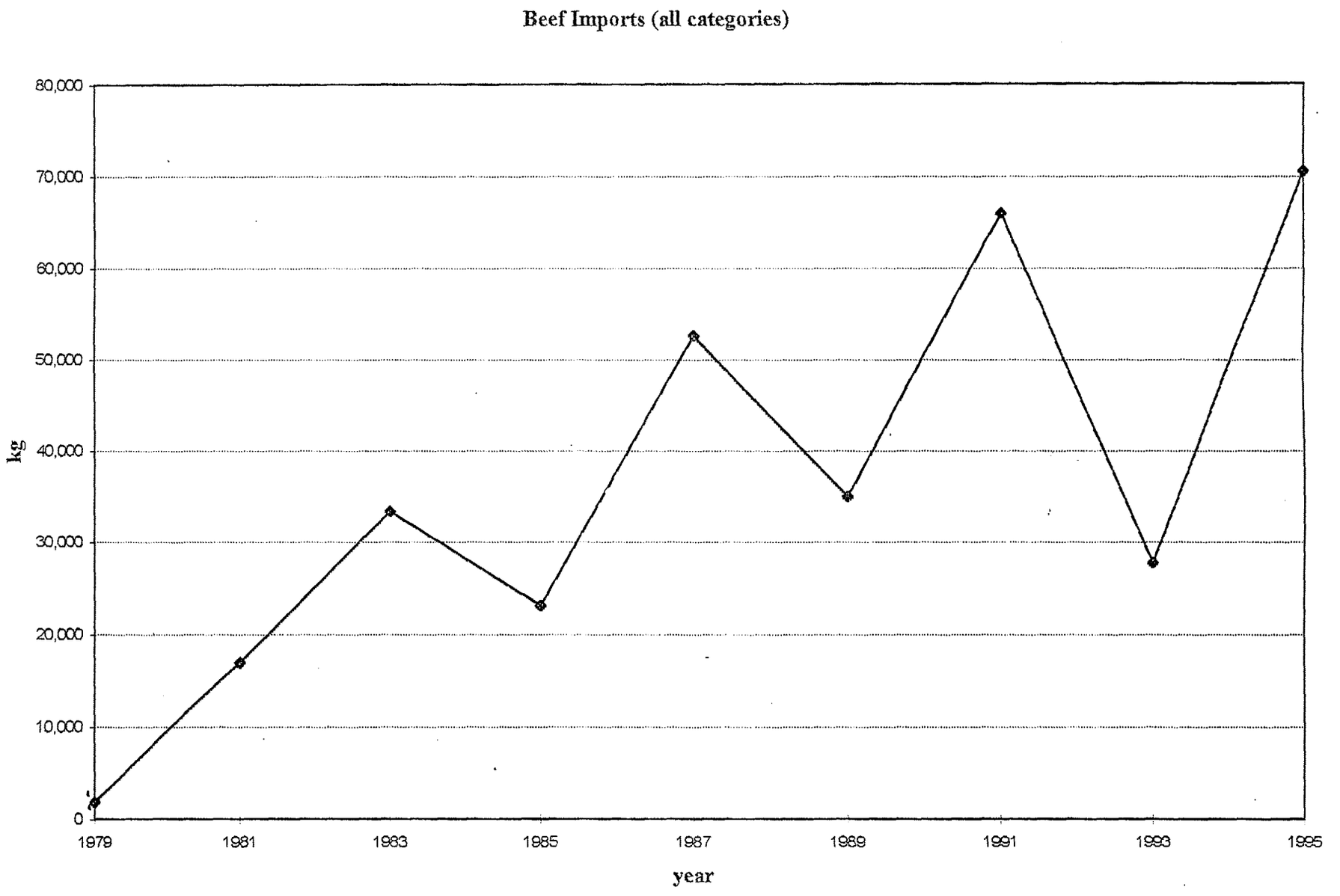
decrease their consumption while more of the above 35 years old respondents also claim the same.

With respect to income, the highest income earning households seem to prefer beef, mutton and fish over others, while the middle income earners prefer chicken. The society as a whole seem to be moving away from beef and pork, especially from beef due to social, cultural and religious reasons mentioned earlier in the study. However, it was interesting to find that some consumers are refraining from consuming these meats for no strong reasons but to follow what makes them feel more comfortable in the Sri Lankan society today while some mentioned that they are being forced to refrain due to lack of access to these meats.

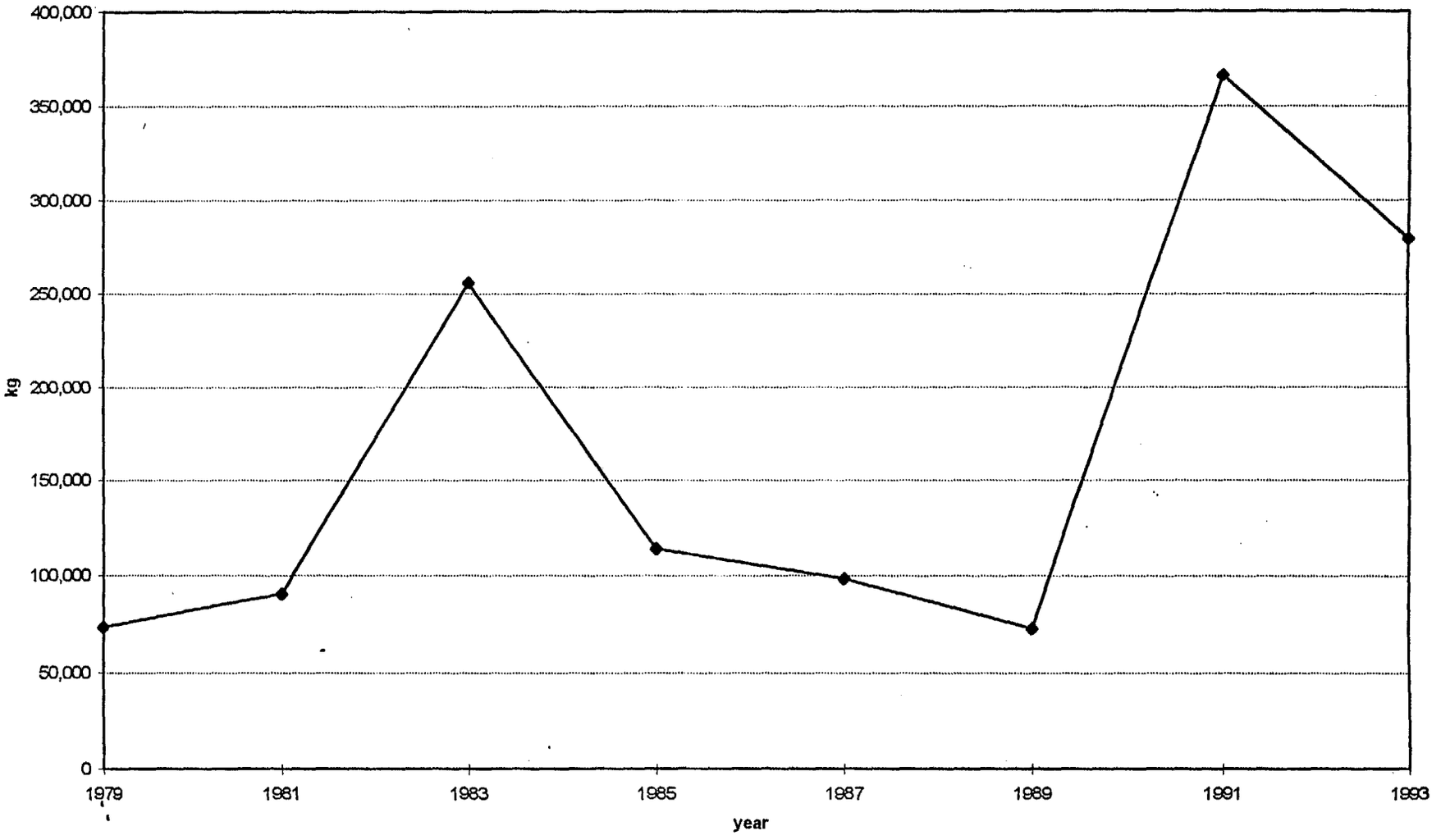
Overall, Sri Lankans seem to be more likely to decrease the consumption of beef and pork while increasing the consumption of chicken, soya meat and fish, unless alternatives are offered to them that are suitable in terms of price, availability and most importantly suitable in terms of social and cultural stigmas. One of the interesting findings of this study was that majority of these respondents consider social, cultural and religious aspects before the health and nutritional aspects when selecting a type of meat to consume. When considering the potential for introducing alternatives, mutton is suggested as a very viable alternative due to its familiarity and the lack of social, cultural and religious stigmas. The negative aspects that will have to be dealt with in order to expand this industry are the relatively high price, lack of supply, and ensuring the consumers trust as to the genuinety of the meat. This is also indicated in the import statistics where mutton/lamb imports have increased over 400% over the last decade. Especially the highest income group who seem to be moving away from eating chicken and are looking for other alternatives accept mutton, pork and beef. With respect to the non-traditional meats, wildboar seem to have the highest potential, with turkey, lamb and duck having less potential which may be increased with more awareness, but the alternative of rabbit meat was rejected by the majority and does not have the potential as a meat that can be introduced to the Sri Lankan consumer.

APPENDIX

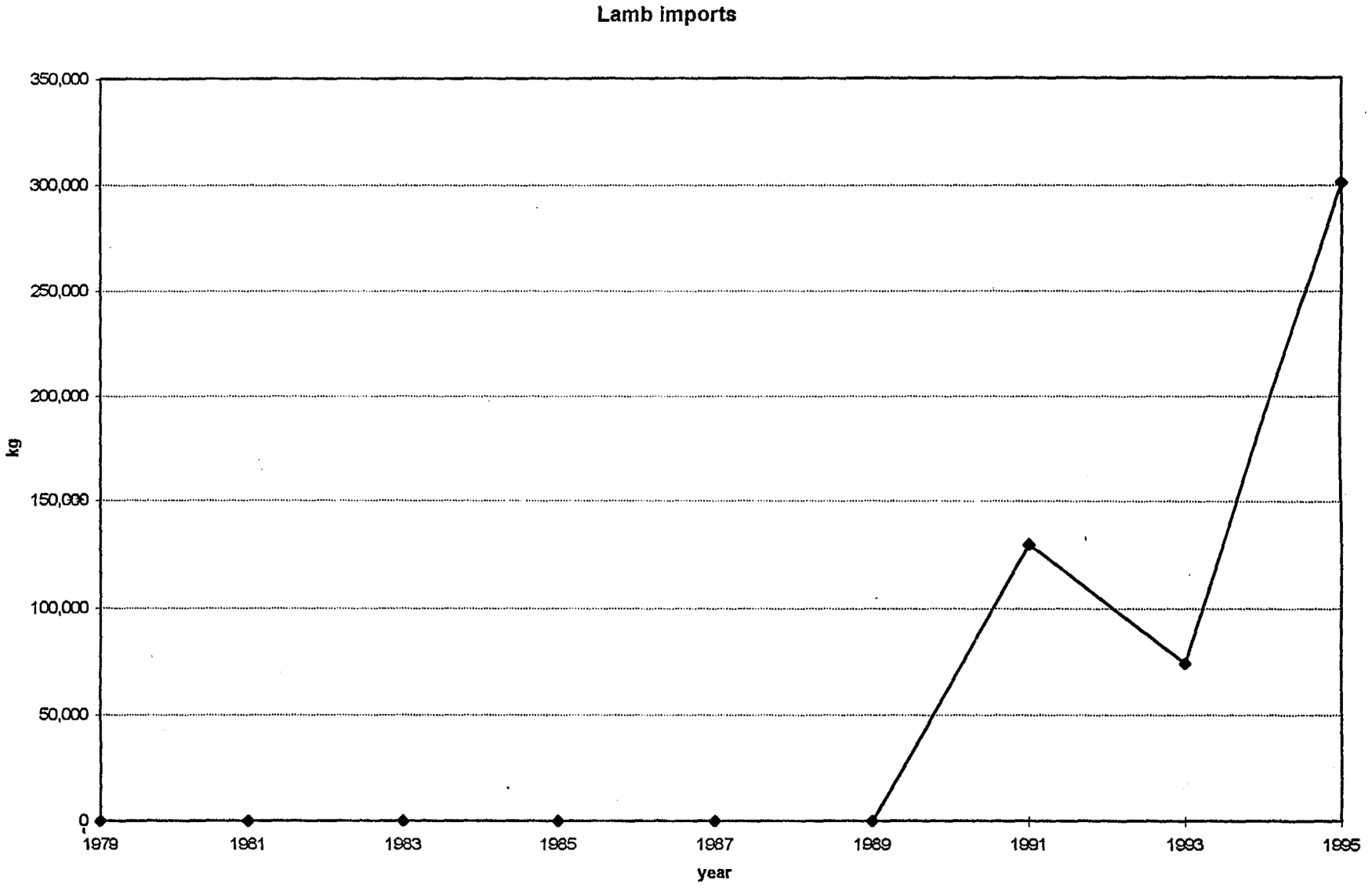
Import statistics on meat. Source: Sri Lanka Customs.

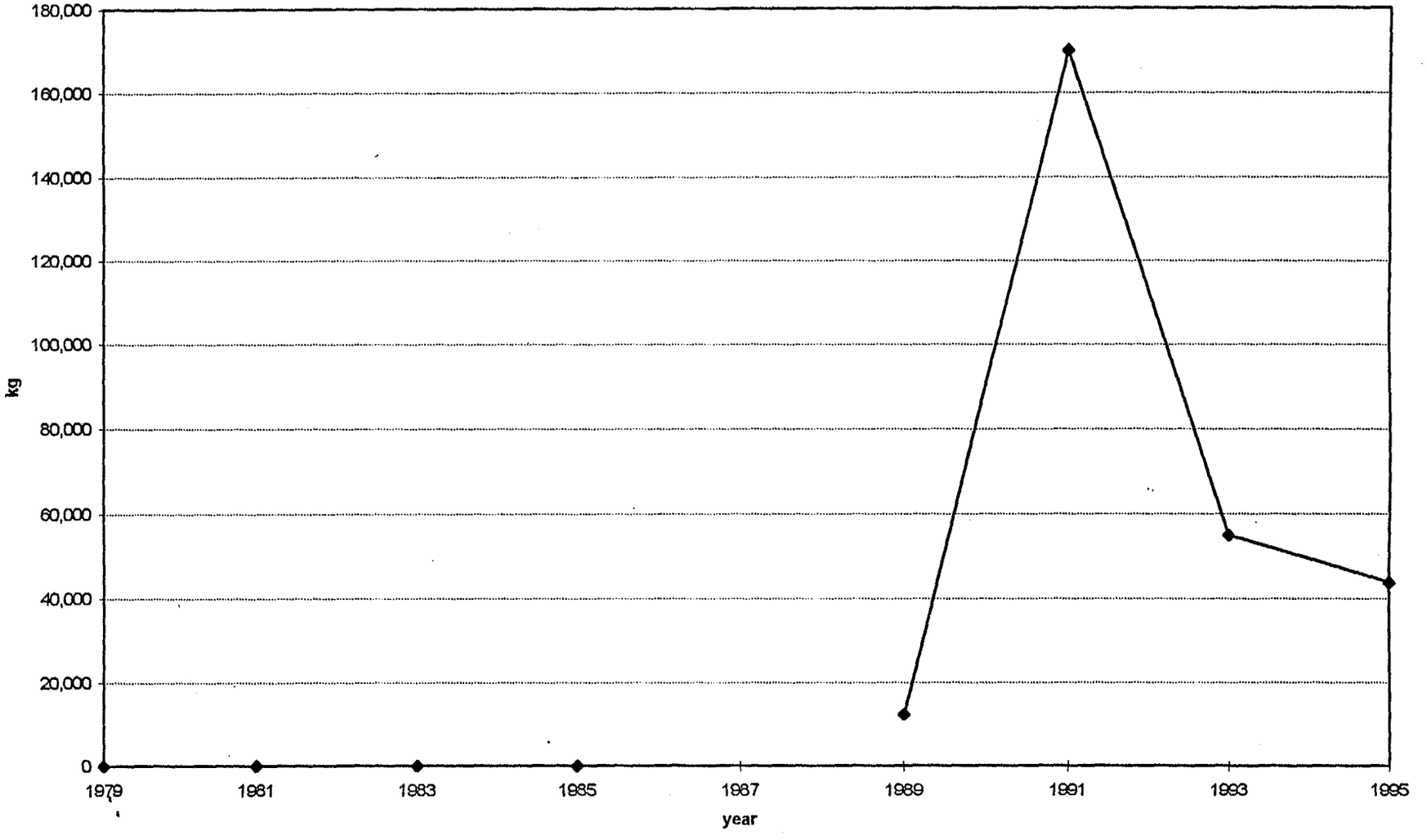

Beef Imports (all categories)
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
kg
1979
1981
1983
1985
1987
1989
1991
1993
1995
year

Poultry imports



Pork imports


Lamb imports
350,000
300,000
250,000
200,000
150,000
100,000
50,000
0
kg
1979
1981
1983
1985
1987
1989
1991
1993
1995
year


Mutton imports
180,000
160,000
140,000
120,000
100,000
80,000
60,000
40,000
20,000
0
kg
1979
1981
1983
1985
1987
1989
1991
1993
1995
year

Sheep/Goat meat imports

Rabbit, Turkey and Duck imports