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The marketing factors influencing the foreign market-break-in of the stifolder sausage as a Southern-Transdanubian Hungaricum

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ABSTRACT

The marketing surroundings of HÍR member stifolder sausage producer SMEs are examined in this article. The examination aims at providing an overlook about factors on booth macro and micro level which fundamentally affect the production circumstances of this product in foreign and local markets. We can clearly see from the results that the traditional Hungarian dishes may provide a good basis of the appearance on the international markets, because they carry the uniqueness, high quality and source of pleasure that can be charming for the European consumers. This is primarily true for countries, where sausages are accepted and known by the consumers, and where the stifolder sausage can appear as a unique expansion of the selection on the shelves. At the same time, the quite closed, local-patriotic consumers like the French are more open to new flavours, and to other nations' dishes. The internal and the external marketing factors show that the instruments necessary to be able to help to appear on the national and international markets are not to be found in the case of the examined Hungarian SMEs. Therefore it is difficult to detect and adjust to the surrounding processes with these abilities.
(Keywords: stifolder sausage, traditional Hungarian dish, SME, marketing surroundings)

A stifolder vastagkolbász, mint dél-dunántúli hungarikum külföldi piacrajutását befolyásoló marketingtényezők

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ÖSSZEFOGLALÁS

Jelen írásunkban egy a HÍR gyűjteményben is szereplő hungarikum jellegű élelmiszer, a strifolder vastagkolbászt előállító vállalkozások marketingkörnyezetét vesszük górcső alá. A vizsgálat célja, hogy áttekintsük azon makro- és mikrokörnyezeti tényezőket, amelyek alapvetően meghatározzák egyrészt a termék előállításának, másrészt hazai, valamint nemzetközi piacrajutásának feltételeit. Az eredményekből jól látszik, hogy a hagyományos magyar élelmiszerek alapvetően jó alapját képezhetik a nemzetközi piacokon való megjelenésnek, hiszen magukban hordozzák azt az egyediséget, magas minőséget és élvezeti értéket, ami az európai fogyasztók számára vonzó lehet. Ez

elsősorban azon országokra lehet igaz, ahol a fogyasztók már elfogadták és ismerik a kolbászféléket és a stifolder vastagkolbász egy választékbővítő, unikum jelleggel jelenhet meg az üzletek polcain. Ugyanakkor az olyan zárt, lokálpatrióta fogyasztók mint a franciák egyre inkább nyitottak az új ízek, más nemzetek konyháinak megismerésére. A belső és külső marketingkörnyezet vizsgálata alapján kijelenthető hogy sok szempontból hiányoznak a hazai élelmiszeripari kis- és középvállalkozások kezéből azok az eszközök, amelyek jelentősen segíthetnék akár hazai, akár nemzetközi megjelenésüket és sikeres piaconmaradásukat. Ilyen adottságokkal a szektor tagjai a környezet változásait csak nehezen képesek nyomonkövetni és azokhoz gyorsan alkalmazkodni.
(Kulcsszavak: stifolder vastagkolbász, hagyományos élelmiszer, kisvállalkozás, marketingkörnyezet)

INTRODUCTION

The stifolder sausage appeared in our region with the settlement of German peasants in the South-Somogy, Tolna and Baranya counties at the beginning of 18th century, and has become since then a part of our national dish, primarily in the Baranya country. In our present essay we assumed to map the environmental marketing factors, which influence the Hungarian manufacturers of the product, and through these factors the appearance of the product on external markets. We also want to make suggestions through these factors on the considered territories of the external sales of the product.

The stifolder is a raw sausage, which has a diameter of 45-55 millimeters, can be filled in artificial, or natural filler, its length is from 20 to 55 centimeters, it is made of pork or beef and bacon, flavoured with salt, sugar, nitrate, grinded pepper, green-, hot paprika and garlic, and is cured by fuming and dehydration. The product is, similarly to other sausages, brownish-red coloured, has a smell and taste that is pleasingly steamy and spicy. Its structure is compactly resilienced, good conglomerating and well sliceable. At the cut we can see the reddish, paprika coloured meat and bacon specks in meat puree embedded, evenly dispensed (*FVM AMC,* 2002).

THE CONSUMER'S OPINIONS ABOUT HUNGARICUMS, AS SPECIAL QUALITY FOODS

According to surveys made by *Szakály et al.* (2008) the opinion of the consumers about the hungaricums as special quality food is basically favourable. The product category is considered to be rather healthy, though in some cases, mostly because of the preparational method, a less healthy picture is associated with the product group. In opposition with the rushing world, the product group is connected to the picture of declaration and to the valuable time, which has been spent in the company of friends, according to the opinions of consumers. The choice of ingredients is of crucial importance for the consumers, especially when it has a delicate quality, or stems from a natural farming technology. The most important advantage of the hungaricums appears in the threefold viewpoint of traditionality quality and life feeling. In this viewpoint the hungaricums are preferred by the basically hedonistically consuming Europeans, because they can offer something special, unique and with high pleasure value.

The coming to the front of these characteristics of the national dishes, like special products, is getting stronger in consumers of the European countries. The product-category appears as a counterpoint to the globalizing food trends (fast food) in the consumers' nutrition. During journeys, the European consumers have an urge to get to know the national dishes and the global consumers appear in growing numbers within the consumer- groups of certain nations. There is a strong traditionality connected to the hungaricums, just as to stifolder sausage, which covers the ingredients, the processing methods and also the provenance. That the recipes and processing methods do not change over generations, is an accentuated requirement (*Szakály et al*., 2008), which closes out the large scale factory production, because of the unique processes and because the products stand on the marginal market.

Because of these factors, the production of the stifolder sausage can be a charming alternative for the small- and medium-sized enterprises, because it means a real hungaricum for the consumers, if the ingredients come from a natural source, and if the traditional recipe and processing methods are followed.

Only these companies are able to keep up the over-the-generations-unchanged-nature of the product in small scale environments and secure the unique background that is connected basically with the product's decelerating and traditional picture, which is incompatible according to consumers' opinions with the large scale production.

Accordingly to these factors, we try to analyse the fields, which have crucial effect on the competitive power and operations of the small and medium-sized enterprises, and how these can define their entry to international markets.

THE MAKRO-ENVIRONMENTAL FACTORS OF THE COMPANIES

The most commonly used frame for the valuing of makro-environmental elements is provided by the so called STEEP-analysis (*Johnson and Scholes*, 1997). This is an acronym made of the English words social, technological, economical, ecological and political. It incorporates elements, on which the companies have no influence whatsoever, they can not change them. The companies have to get used to these factors, they have to accept them as given.

The most stable element is the group of social factors. These change over quite a longer time-period, they can be considered as stable in short-period-planning. In the developed countries there is a general tendency today, which is different in scale in the coutries, towards the decrease of birth-rates and increase of older age-groups.

According to the Hungarian demographical data we can conclude that nowadays the rates of the over-sixties and the below-19's are almost equal. The forecasts for 2050 count for 80% more old-aged, than youngsters in Hungary, where the most optimistic guesses count for 1.5 million less Hungarians by this date, than there is today. The Hungarian demographical decrease will have an effect on the labour market, too: the rate of working labour will decrease gradually, and according to the forecasts it will sink to the level of the I.WW with under 4 million people (*Mátyus*, 2006).

Furthermore, there are other factors, like the expelling of marriage, of working start and childbearing; the growing rate of single households; the dissenting income-differences of social groups and the growing level of general qualification, that actively influence the person's value judgement.

The next element is the technological environment, which in opposition to the previous one, is the most dynamically changing factor. The peculiarity of small- and medium-sized enterprises (SMEs) in Hungary is that the technological level is higher on medium level, but the change of management-structure does not go together with the enlarged size and capacity (*Nyers and Szabó*, 2003). This means that management skills are missing behind the bigger production-potential that would be required for the more effective sales. The capacities will therefore be used under potential, which leads to the growth of cost-rates on one unit. The endeavour of the large enterprises to choose the highest qualified experts for the coordination and carrying out of the single tasks, in order to maximize the efficiency of the system, that are operated by them.

The biggest change in the technological environment, that incorporates the highest possibilities for the SME sector, is the apace spreading of information technologies. The most important effects of Internet based technologies and mobile-communication on small enterprises are the following (*Wierenga*, 1997):

- They make the use of *cost-efficient*, personalised and interactive marketing possible.
- It makes the *fragmentation of the market* possible, and the products gear to the local market.
- It contributes to the *rearrangement of the power relations* within the supply chain, and to the straightening of the bargain positions of the retail trade.
- It contributes to the *dematerialization of the product*, it makes its growth of service- and information- content possible.
- It changes the absolute and relative size of *transactional costs* connected to the input barter.

It is clearly seen that the spreading of informational technologies is beneficial for the small enterprises, because through advantages like, cost-efficient marketing activity, segmentation of the market into smaller units and the possibility to connect services to the basic product, that could make them successful on the market.

The literature considers the main trend of the economical environment the globalization, which is also in Hungary roboustfully perceptible. We distinguish four types of it: the globalization of consumerism, of power structures, of financial structures and of social structures (*Lehota*, 2005). The most graspable for small enterprises in food industries is the change in consumerism and power structures. The change of financial structures is also influential, indirectly though, in the change of financing conditions; but this is less roboustful for the time being.

The food trends, which are obviously present in more developed countries, are getting stronger even in Hungary with the globalization of consumer structures. Eating is more than simple nutrient uptake, it appears as the key to health, regulator of the body's achievement and appearance, cure of illnesses, a territory in a need of science, method of pampering and discoveries, a method of self- realisation, a source of success and acknowledgement. At the same time, the boundaries of eating disappear, its social role decreases, the rhythm of the job is more influential. The need for quickly preparable and consumable, mobile foods have grown, as well as for the packages portioned for one or two, because of the increasing numbers of households, that consist of one or two people (*Törőcsik*, 2007). Apart from the change in eating habits, the consumers are more and more concerned about food leading to their health.

In the case of the power structure change, the most visible effect on the life of SMEs, is the power concentration of retail trade chains, and the import abundance derived from the effective global logistic systems of multinational food- producers.

The size of concentration of the retail trade is variable in European countries (*Table 1*). There is a clear distinction to be noted between the Northern and Southern parts of the West-European continent. In Greece, Italy and Spain the market shares of super- and hypermarkets is recently not over 50-60%, while in The Netherlands, Great-Britain or Belgium they cover about 90% of the market (*Clark and Stephanides*, 2003). In Hungary, the CR5 index is 48.2% (*Lehota*, 2005), which is far behind the West-European average, but it is the highest in Middle-East- Europe, with the rate steadily growing. Meanwhile, in the countries with high CR5 indexes, we can observe the shift of the average company sizes towards medium enterprise level, together with the strengthening of their connection- systems vertically and horizontally.

Table 1

The market share of the five biggest food retailers in some European countries

Country (1)	Market share average (%) (2)
Austria (3)	79
Belgium-Luxemburg (4)	57
Denmark (5)	78
Finland (6)	96
France (7)	67
Germany (8)	75
Greece (9)	59
Ireland (10)	50
Italy (11)	30
The Netherlands (12)	79
Portugal (13)	52
Spain (14)	38
Sweden (15)	87
United-Kingdom (16)	67

Source (*Forrás*): *Lakner et al*., 2004

1. táblázat: Az öt legnagyobb élelmiszer kiskereskedelmi lánc részesedése a teljes értékesítésből néhány európai országban

Ország(1), Átlagos piaci részesedés(2), Ausztria(3), Belgium-Luxemburg(4), Dánia(5), Finnország(6), Németország(7), Franciaország(8), Görögország(9), Írország(10), Olaszország(11), Hollandia(12), Portugália(13), Spanyolország(14), Svédország(15), Egyesült Királyság(16)

During the analysis of economical factors, it is important to mention the financing possibilties of the Hungarian SMEs. The small- and medium sized enterprises see the unavailability of financial sources as their main problem, which hinders their actions (*Csubák*, 2003), which is the reason for their inappropriate marketing activity. In Hungary the concentration of the capital is more emphatic, more than two-third (69%) of all capital resources belongs to large enterprises (*Pitti*, 2001). The share medium enterprises are 22%, small companies have 4%, and micro- enterprises have 5% (*Csubák*, 2003). Furthermore there is a concentration within the given enterprise size-categories, which means, that the value of capital resources of the companies are way below the categories' average rate, as seen in *Table 2* (*Kőhegyi*, 2001).

The possibility of the companies to get to outside capital, is a significant problem. In Hungary 10% of the companies can fulfill their financing needs through financial intermediaries, while in the EU this rate is 90% (*Kállay*, 2000).

The next element to be analysed is the circle of ecological capabilities. This is a central issue even for the small enterprises in the food- industry, because the problem of scarcity of natural resources comes to the fore. The reason for this is environmental pollution and growing energy-hunger. This problem of small enterprises appears in the prices of input factors, that are required for the production; and in the environment-conscious consumer expectations, that have appeared as a result of the environmentaldestruction. There is a growing need for clear, chemical-free and retraceable food types (*Szente et al*., 2007), though the adequacy to this notion necessitates more and more energy from the producers and processers. This paradox must be solved by the companies of the future, in order to sustain the consumer trust and the natural environment.

Table 2

The average capital resource endowment of Hungarian companies and the Medians of their size-categories' (million HUF)

	Micro- without employee (1)	**Micro- with employee (2)**	**Small- (3)**	**Medium- (4)**	**Large- (5)**
	company (6)				
Average capital resource (7)	9,46	7,43	70,81	389,69	4153,01
Median (8)	1,124	2,87	16,27	129,97	651,895

Source (*Forrás*): *Kőhegyi*, 2001

2. táblázat: A hazai vállalatok átlagos saját tőke ellátottsága és a méretkategóriák mediánjai (millió Ft)

Alkalmazott nélküli mikrovállalkozás(1), Mikrovállalkozás alkalmazottal(2), Kis-(3), Közép-(4), Nagy-(5), Vállalat(6), Átlagos saját tőke(7), Medián(8)

As the last element of the STEEP- analysis we need to overview the political and legal environment. The function of this system is to secure the conditions of production, processing and trade; and the sanctioning, when legislative provisions are violated. The rate, to which it can fulfill its role, depends on its acceptance, development and on its skill to keep everyone to the provisions. Nowadays all three conditions are more or less violated. The regulational environment of the SMEs in food industry, the overwhelming administration, the lack of strategy in agrarian politics; all lead to the fact that the majority of the companies do not see any possibility for planning. Without long term strategy and stable market- environment the goal is mostly mere survival.

The inner environment of the enterprises

The definition of the elements of the micro-environment is dissimilar in theories. The most extensive study is found in the works of *Lehota et al.* (2001), where the following ones are listed: the inner environment of the enterprise, the consumers and the customers on the organised market, the competitors, the suppliers, the intermadiatory organisations on the market, assistant organisations (in finance, research, education…etc.), logistical- and marketing- service organisations, informational organisations, trade associations, representation of interests, political parties, public opinion, non- governmental organisations and the media. From all these factors, the present study makes an effort to analyse the inner environment of the enterprises, and within it, the analysis of the marketing resources, to demonstrate factors the companies can definitely have influence on, opposite to the ones, we investigated in the STEEP- analysis.

The marketing resources according to *Hooley et al.* (1998):

- customer based instruments,
- instruments of the supply channel,
- inner instruments,
- ally based instruments.

In the survey of *Sajtos* (2004) he analysed, among other, the opinion of the companies about marketing- resources. In the research companies with more than 20 employees participated, and they valued the aspects seen on *Table 3* on a scale from one to five (one: significant advantage of the competitor, 5: our significant advantage).

Table 3

The marketing instruments valued as assets

Instrument (1)	**Average (2)**	**Deviation (3)**	**Instrument-type (4)**
The name, and judgement of the company and brand (5)	3,47	0,96	Customer based instruments (21)
Customer trust based on the stable market position (6)	3,70	0,84	
High level of customer service (7)	3,64	0,84	
Good connection with the key customers (8)	3,91	0,84	
Cost- efficient production (9)	3,23	0,89	Inner instruments (22)
Advanced marketing information system (10)	2,80	0,77	
Advanced cost-controlling system (11)	3,04	0,85	
Patents and licences (12)	2,69	0,89	
Connection with the suppliers (13)	3,47	0,75	Instruments of the supply channel (23)
Extended supply channel (14)	2,97	0,83	
The uniqality of the distribution (15)	3,13	0,79	
Connections within the supply channel (16)	3,14	0,78	
Market access through strategical alliance and connections with partners (17)	3,20	0,81	Ally based instruments (24)
Collective technologies with strategical allys (18)	3,07	0,80	
Access to the know-how and management experiences of the strategical ally (19)	2,94	0,85	
Access to the financial sources of the partner (20)	2,87	0,77	

Source (*Forrás*): *Sajtos*, 2004

3. táblázat: A marketingeszközök előnyként való megítélése

Eszköz(1), Átlag(2), Szórás(3), Eszköztípus(4), A vállalat, illetve a márka neve és megítélése(5), Stabil piaci pozícióból eredő vevői bizalom(6), A fogyasztói szolgáltatás magas szintű ellátása(7), Jó kapcsolat a kulcsfontosságú vevőkkel(8), Költséghatékony termelés(9), Fejlett marketing információs rendszer(10), Fejlett költségkontrolling rendszer(11), Szabadalmak és licenszek(12), Kapcsolat a beszállítókkal(13), Kiterjedt elosztási hálózat(14), Az elosztás egyedisége(15), Kapcsolatok az elosztási csatornában(16), Piaci hozzáférés stratégiai szövetségeken és partnerkapcsolatokon keresztül(17), Stratégiai szövetségekkel közös technológia(18), Hozzáférés a stratégiai szövetséges know-how-hoz és menedzsment tapasztalataihoz(19), Hozzáférés a partner pénzügyi forrásaihoz(20), Vevő alapú eszközök(21), Belső eszközök(22), Elosztási csatorna eszközei(23), Szövetség alapú eszközök(24)

According to the research, the companies surmise themselves best in customer based instruments among their competitors. And they feel themselves in a less privileged position in the case of inner instruments and strategical competitors, where they consider their access to patents, licences, know-how-s, information systems and financial sources less successful. According to averages, the company brand name stands as a fore, there are great differences in this field. In opposition to this stands the case of patents and licences, where the companies do not feel their superiority, but we can experience the high deviation in the answers. In the aspect of financial resources and information systems, the two indices show that the companies have no assets what-so-ever, and this is generally true for all companies (*Sajtos*, 2004).

According to surveys made by *Polereczki and Szabó* (2005), the companies in milk- and meat production show a similar picture. The unambiguous result of the research is, that the small- and medium- sized enterprises neglect this field, the lack of strategical marketing planning is visible, and the main reason for that, as defined by the heads of the companies, is the lack of recourse. As their results show, the examined enterprises do not make actual market surveys, their information about the market stems from the acquaintance. The information they are willing to gather cover up mainly the field of price level. The importance of price and price- contest appears in many cases, most of them are clearly committed to their customers expecting low prices from them. It is obvious that in the circle of entrepreneurs the need for the acquaintance of the environment is present, but the adequate basics are missing for that. Their market share fits their size seen by the primary business; they do not reach the 5%, except for those that are present on some special market. Their export activities are considered to be contingent. Their knowledge of the marketing field mainly comes from business-experiments. The efficiency of the funds assembled on marketing is scarcely or not even controlled. The life-cycle analysis are known only to few, and even the ones, who create analysis similar to this, they do not create marketing plans connected to it. They consider their products from the consumer side definitely as positive, but there is no brand name connected to the good quality, which the consumers may remain loyal in advance. They consider the price to be the most important base of competition. By the creation of the prices, they take the prices of the competitors into consideration, which shows the strength of the price-contest on the market. During the research, no peculiar channel type could be distinguished among the companies under examination, they try represent themselves on all levels. They do not consider the use of channel- politics to be a factor, which could lead to any advantages in the contest. The marketing policy means by most of them advertisement, and most of them sell by themselves. The notions of marketing and advertisement are equal in the vocabulary of most companies.

CONCLUSIONS

We can clearly see from the results that the traditional Hungarian dishes may provide a good basis of the appearance on the international markets, because they carry the uniqality, high quality and source of pleasure that can be charming for the European consumers. This is primarily true for countries, where sausages are accepted and known by the consumers, and where the stifolder sausage can appear as a unique expansion of the selection on the shelves. At the same time, the quite closed, local-patriotic consumers like the French are more open to new flavours, and to other nations' dishes.

Over the marketing- efforts for the sale of a specific product, the building of a national image is just as important, which would be the assignment of the organisation responsible for home communal marketing. The construction of Hungary, as a cover brand, shows germinal conditions, which are indispensable for the introduction of specific products and product-groups of the potential export- markets. The stifolder is in a fortunate position, because it can be connected to stereotypes of Hungary (gulyás, puszta, paprika), so the introduction and acceptance of the product may be easier than it is with a food type that is less stereotypic (for example: cheese). The adequate national image can secure the positive consumer attitude that result in the acceptance of the stifolder as a high quality, special and traditional product.

The first suggestion to be formulated is the positioning of the Hungarian products as a high quality, pleasuring and unique ones, while building up Hungary, as a cover brand on the export markets, which could create a base for the appearance of specific products in foreign countries.

We could observe that traditionality is of great importance for the consumers in case of national food, which they expect on the level of ingredients, processing, and recipe, as well.

Two suggestions are to be formulated now. The first one is that the producers have to create products that fit these primary expectations. This excludes large scale production, expects the use of ingredients of outstanding quality, deriving from mostly extensive production, and the over-the-generation-unchanged nature of processing methods. The second one is that the economical environment surrounding the companies should enable the small enterprises to function and to be profitable on the marginal market with their products.

Distinct from the product, in the analysis of the companies and their environment, we can make the following remarks.

It is clearly seen that in many regards the instruments are missing from the Hungarian small- and medium sized enterprises that could enhance their appearance and perseverance on national and on foreign markets. The most important suggestion to be formulated might be the attainment of marketing- approach, through which the companies may be able to recognise and correctly interpret the voice of the consumer-groups.

The small enterprises in the national food industry may not have recognised the advantages of the marketing- instruments just yet. The change of views on this field would be of extra-ordinary importance, because they curtail themselves from the chance of product-developments, and market roles in the future. With the recognition of the simple principle, which can be found in *Table 4*, that means that the own ideas of the companies can only be successful, that they can make the innovation of the new products more efficient and that they can modernize the existing ones with the use of correct marketing-information.

By this thinking, two risk- factors can be distinguished in the mechanism of the strategical decision-making of the product development. In the first case, remarkable resources have been invested in a new product, but the appearance on the market is a failure (mistake type no. 1). In the second case, there is a hidden potential for the (functional) food product, but the idea of the development of the new product is undeservingly underplayed, or skimmed over. Even if the companies are not conscious of these, because we value the ideas as left- out possibilities, or as the omitting of market possibilities (mistake type no. 2) (*Van Kleef et. al.,* 2002). The companies have to recognise the values of procurable marketing-information; they have to build it in the process of company- strategy and product-planning, to maximize their chances in the future.

Table 4

Type-1 and type-2 errors in new product development

		Externel reference-Consumer acceptance of new product will be… (1)	
		Low (5)	High (6)
Internal reference According to science and technology base, new product will be…(2)	success (3)	Type-1 error Unjustified investment (7)	Opportunuity agreement (8)
	no success (4)	Non-opportunity agreement (9)	Type-2 error Opportunity losses (10)

Source (*Forrás*): cf. *Eliashberg et al*., 1997; *Van Trijp*, 1999

4. táblázat: Az 1-es és 2-es típusú hibák megjelenése új termékek fejlesztése során

Külső vélekedés-a fogyasztói elfogadtatás szintje…(1), Belső vélekedés-tudományos és technológiai alapon a termék…(2), Sikeres(3), Sikertelen(4), Alacsony(5), Magas(6), 1-es típusú hiba - Indokolatlan beruházás(7), Lehetőség(8), Piaci lehetőség hiánya(9), 2-es típusú hiba - A piaci lehetőség elvesztése(10)

We ought not to forget that the economical-political environment surrounding the small- and medium sized enterprises does not support their appearances on the international markets. To this comes the growing concentration of European food industry and trade, which renders their position more difficult. They can still be competitive over the long term in the market of the discussed niche products, because we talk about small market segments.

So we can identify three fields, as the key points to the success of the displayed product on export- markets. The first one is the correspondence with the consumer-requirements connected to the product- characteristics. The second one is the recognition and interpretation of „the voice of the consumer", which is aided by the marketing-conception built-in and applied in company thinking. Besides the company level, this has to appear efficiently on the national level, too, so in the efficient community marketing activity. The third one is the favourable change in the economical and political environment of the producing companies, in a way, that it helps, secures and makes the small enterprise production calculable.

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