Analogous Products and Food Quality Products: Two Poles of the Competition

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Summary

The globalisation of processing industry and the consolidation of the international retail trade, together with the increase of imports after the EU access, supported the competition hot up and saturation of domestic food market.

Both food processors and food retailers are exposed to increasing competition. In order to maintenance on the market they are increasingly pressed to minimize their costs and/or to accomplish higher prices for products with competitive advantage. Besides of that all participants of the agri-food chain are pressed to intensify marketing support of their goods.

Aiming to reduce the costs, some of processors choose the way by the substitution of part of the input material by another, cheaper one. On the other hand, the offer of foods with specific quality attributes such as organic foods, regional marks, specialities or other quality food products is a way, how to surpass the sharp competition.

On the background of the retail network development, of shopping behaviour and of development of competition, this study recapitulates main marketing trends on the food market in the Czech Republic, the reasons of these trends and their impacts. In the study a space for food quality products on the Czech market is being searched in the competition with products of lower price categories.

KEYWORDS: competition, marketing, quality

Introduction

The amendment of economical and business environment, which went the Central and East European Countries during past seventeen years through, together with the global development of food market, influenced the development on the food market in the Czech Republic.

The essential determinants, which influenced contemporary development of domestic food market, are rapid development and change of retail network, change of shopping behaviour, free access of European goods on the Czech market after the EU enlargement, globalisation of processing industry and others.

Background - Food production and consumption

Food industry, with it´s share of 12 % on the Czech processing industry and with about 10 % of the Czech labour source being employed in this branch, ranks among five most important industrial branches in the Czech Republic.

From the European point of view, direct foreign investments tide in this branch between 1993 and 2004 represented 11 % of the total amount of foreign investments. There are three distinct phases in the tide of foreign investments in Czech food industry:

Beginning of nineties of the past century: most of foreign investments in this sector have been realised in this period, predominantly in a form of privatisation of state enterprises. In this period companies as Danone, Nestle and Unilever buyed Czech companies, usually with the domestic mark.

End of nineties of the past century: with the end of privatisation, the tide of foreign investments leaved off and most of foreign investmets has been realised in a form of modernisation and enlargement of existing plants.

From 2004: abolition of trade barriers within the old and new EU countries, increasing purchasing power of new member countries inhabitants stimulated recovery of foreign investors interest. As the Czech market is relatively small, most of invetors, comming in the Czech Republic, builds processing capacities for export quantities.

Consumption of food in the Czech Republic allocated into basic categories exhibits the table 1 enclosed. According to household books stattistics the share of consumers´expenditures for foods and beverages in 2004 amounted to 22,9 % of the total consumption expenditures (of that 19 % for foods, 2,2 % for non alcoholic drinks, 1,7 % for alcoholic drinks).

Objectives

Development of foods distribution network

Development of foods distribution network is one of the factors, which significantly affects the foods demand and which participates on the changes of shopping behaviour. The choice of shopping place and consumers´ requirements on shopping conditions are determined especially by the structure of foods distribution network.
Multinational marketing chains entered the Czech market in 1995. Since that time the number of large-area stores as well as the total shopping floor space is growing. The share of small stores dropped.
The study Shopping Monitor made by companies *INCOMA RESEARCH*, Praha and *GfK*, Praha contains actual information about shopping habits and purchase preferences of Czech population. The study is focused on the main aspects of shopping behaviour, shopping preferences and consumers´ satisfaction with their shopping conditions. The study presents results of quantitative research made by personal questioning through the network of qualified interviewers on the representative database of 2000 persons. The database of persons questioned is made by stratified multilevel random sampling of respondents in the age of 15 – 79 years.
In the frame of the study a range of criterias by foods shopping were examined, the most important being:

- the main shopping place
- satisfaction with the frequency of Czech products on the market
- satisfaction with the frequency of brand products on the market
- satisfaction with shopping conditions, price labeling, the main shopping place of particular food types etc.

On the base of permanent monitoring of the recent development on the market and actual information of last presented study 2005/06 we can evaluate the development of chosen factors of shopping behaviour in the time series of 1997 – 2005 respectively 1999 – 2005.

The main shopping place for foods

This factor is one of the key indicators being examined. The study Shopping Monitor proved that, as well as in the recent years, also in 2005 tha basic criterias for the choice of the main shopping place for foods were:

- easy accessibility of the shopping place (for 67 % of respondents),
- favourable prices (for 58 % of repsondents),
- large assortment scale of goods (for 46 % of respondents).

The development of the main shopping place for foods indicates the table 2 enclosed. The particular shopping units, classified in the examination, are defined by *INCOMA RESEARCH*, Praha and *GfK*, Praha as follows.
Hypermarket: self-service shopping unit with more than 2 500 m^2 shopping area, significant distribution of non-food assortment, more than 18 cash desks.
Supermarket: self-service shopping unit with 401 – 2 500 m^2 shopping area, complete dominance of fast moving consumer goods, 4 – 18 cash desks
Discount: self-service shopping unit, complete dominance of fast moving consumer goods, the extent of shopping area corresponds to supermarket one, the assortment is significantly limited and the price level is low.
The stated data exhibit that in examined period 1997 – 2005 the share of those respondents rapidly increased, who prefer hypermarket as the main shopping place. The increase culminated in 2003. There is significant increase of preferences for discounts, too and the share is still being growing. On the contrary, the share of respondents, prefering supermarket as the main shopping place for foods, continuously drops from 2001. The drop of preferences exhibit also counter shops and small sel-service shops. Generally, while in 1997 the marketing chains shopping places (hypermarket, supermarket, cash and carry, discount) were prefered as the main shopping place for food by 34 % of respondents, in 2005 these kind of shopping places were prefered by 77 % of respondents.
The table 3 exhibits preferences of particular marketing chains by shopping of foods in the Czech Republic. The most succesfull marketing chain is Kaufland, having 16% share of shopping preferences among all marketing chains presented on the domestic food market and having by 7 % more preferences than the second one – Penny Market.

Satisfaction with the frequency of Czech products on the market

The respondents are with the frequency of domestic products on the Czech market generally satisfied. The share of "very statisfied" and "rather satisfied" respondents in 2005 was together 89,6 %. Development of results of this examination in figures exhibits the table 4. The biggest number of satisfied respondents appeared in 2001, then the number declined a little. The decline of the share of satisfied respondents reflects likely increasing share of imported foods, being offered in marketing chains.The foods of Czech origin have good position at Czech consumers. Czech producers have a good chance to establish themselves on the domestic market because the demand for domestic foods does exist.

Satisfaction with the frequency of brand products on the market

The development of this factor is similar to the development of satisfaction with Czech food products. However the decline of "very satisfied" and "rather satisfied" is bigger than at Czech products. This trend is probably an impact of the fact that increasingly more consumers realize what are the brand goods, their serviceability and advantages. The share of "very satisfied" and "rather satisfied" respondents in 2005 was together 82,7 %. Development of results of this examination in figures exhibits the table 5.

Satisfaction with shopping conditions

Among the shopping conditions, which are determinants of shopping satisfaction, were included opening time, assortment scale, price level, freshment and quality of foods, cleanness of the shopping place, pleasant staff, servicequickness etc. The development of results of examined factors in figures exhibits the table 6. Generally the satisfaction with shopping conditions in the examined period increased. The biggest share of "very satisfied" and "rather satisfied" at most of aspects was in 2001, later the number declined a little. The increase of satisfaction is likely an impact of rapid changes of shopping network because in this period a rapid increase of large-area shopping places appeared. On the other hand, the consumer got used to a high quality of shoppings conditions and their requirements increased.

Development of foreign trade

The supply and the competition on the domestic food market was significantly influenced by the accession of the Czech Republic to the European Union because the exchange of agrarian and food commodities with the EU countries represents a crucial share of the Czech agrarian foreign trade.

The export of agrarian and food commodities to the EU 25 participated on the total Czech agrarian export in 2005 by 84,8 % and corresponding import participated on the total agrarian import by 89,3 %.

The access to the EU market and the abolition of the most of barriers made easy the movement of goods on all agri-food chain levels. Subjects, which practically realize this trade exchange, can be classified into three main categories.

Strong and smaller trade companies

Marketing chains

Producers

Traditional foreign trade being realised by trade companies is increasingly complemented by foreign exchange in the frame of marketing chains and by production subjects. Increasing significance of marketing chains and producers is determined by consolidation of international retail and by globalisation of processing industry.

Consolidation of the international retail: Multinational character of marketing chains and positioning in a great number of European countries set up conditions for the exchange in the frame of the chain. The distribution of goods with the lowest purchasing prices in the chain without any respect of boundaries, strategy of central stores and other ways of minimization of costs are the main reasons.

Globalisation of processing industry: The establishment and the development of mergers, strategic aliances, joint ventures anddirect foreign investments on the level of processing industry builds a space for foreign trade in the frame of one production company. The effort to grow, the attempt to gain raw material sources and other factors support rapid development of this phenomenon.

General trends in agri-food chain, i.e. globalisation of processing industry and consolidation of the international retail together with the expansion of multinational chains in the Czech Republic and the accession to the EU participated on the extension of food supply in the Czech Republic and on the grow of competition on the domestic market. The actual food market is saturated as both volume and assortment are concerned and the space for any market slot is limited.

At this situation the further persistence of processors and retailers on the market is dependent on:

- minimization of costs
- accomplishment of higher prices for products with competitive advantage
- promotion of the goods.

Analogous products – a way to minimization of production costs?

The EU access and the adoption of all principles, requirements and norms represented a considerable investments burden for a plenty of food producers. Further technology investments for the costs minimization are for a lot of producers limited by financial exhaustion and by financial obligations from the pre-accession period.
Aiming to reduce the costs, some of processors choose the way by the substitution of part of the input material by another, cheaper one. At animal products, part of the animal protein is being substituted by material of vegetable origin. On the market there appears than analogous products, which are targeted to the same consumer as standard products and which have a position of competitive products. The lower producer costs become the competition advantage. Substitution of animal component appears partly at smoked meat products but predominantly this effect comes into practice at milk products.
There are several spheres generating, respectively supporting this kind of competition and facilitating the distribution of these products to the consumer.

Analogous products are output of processing industry, the competition is generated on production level within the frame of one branch.
The sale of analogous products is supported on the retail level.
The sale of these products is supported by the sector of services, i.e. in public catering.

Ad a. As for the use of alternative raw components the analogous products do not meet requirements for milk products and they can not be classified as milk products. However these products wittingly evoke the image of standard products, by following practices namely:
Small amendment of well known name of standard milk product.
The producers evade the term “cheese” or “butter” so that they use other word which directly evoke this term. For example following approaches are typical:
The brand (name) of processed cheese is so well known, that using the name only, without the word cheese, evokes the idea of cheese at the consumer.
Eventually, the term of “butter” is used in a tiny form (something like “small butter”) and the consumer understands that he buys butter.
Another way is to use certain characteristics of the product. The idiom “cheese to fry” is substituted by the substantive, deducted from the verb “to fry” without using the word cheese (something like “for frying”). However, the consumer, on the base of visual characteristics, understands that he buys cheese to fry.
The invention in this sense is great.

- Distribution in the packing generally used for standard product.

Analogous products are mostly packed in such packing, which is very similar to packing of these standard products, which they compete to.

Ad b. The sale of analogous products is supported on the retail level. Among the principle ways, how to boost these sales ranks:

- Allocation of the goods.

Analogous products are offered among standard products, non separately, without any differentional information. With respect to the same external look (form, packing, colour, etc.) and to their name, the differentiation from standard products is a very difficult task for the consumer.

- Orientation of promotion campaign.

The shopping preferences research proved that more than 70 % consumers buy milk products in hypermarkets, supermarkets and discounts, i.e. in the marketing chains stores. Marketing and promotion campaign lead by marketing chains in the Czech Republic is predominantly targeted on the low price. Promoting activities of marketing chains indirectly contribute to the sale of analogous products.

Ad c. The use of analogous products in public catering is for consumers an especially unfavourable matter because use of substituents in this sphere is difficult to be detected by consumer himself. Here, the consumer is fully dependent on the institution of quality control.

In the Czech milk sector there appear analogous products which compete to processed cheese, fresh cheese, butter, soured products and dry milk products. Their share on the milk market can not be

identified exactly because corresponding research has not been made until now. For the time being, the quantity seems to be marginal with the rising trend.
Analogous products with their name, form, packing and way of sale mislead the consumer. Their qualitative and taste characteristics do not correspond to standard products. These points of issue are objects of the interest of Consumers Defence Association in cooperation with Czech Agricultural and Food Inspection Authority. At the time being, the publicity of this fenomenon is eligible so that the consumer would be informed about the presence of this fenomenon and its´ impacts. The question is, if even after radical information campaign Czech consumers:

- would be able to identify analogous products on the market,
- would prefer standard products with higher prices,
- would buy analogous products accepting the lost of qualitative characteristics.

Quality food products on the Czech food market

On the other hand, a way how to compete is to produce the items with such competitive advantage which allows setting higher prices. This way proposes the offer of foods with specific quality attributes such as organic foods, regional marks, specialities, very high value added foods or other quality food products. High quality and exceptional qualitative and taste attributes become the competitive advantage. However this strategy requires advanced market demand because the saleability of these products is based on consumers´ willingness to pay for the over standard quality.

Organic foods

The Czech organic food market is marginal for the present, however there is a dynamic development. Mapping of this market is regularly occurred by a firm, specialized in consulting activities in this sphere of the food market. The examination is being made through questionnaires covering all the production – consumption vertical.
The examination exhibited that in 2005 organic foods participated on the total food consumption in the Czech Republic by about 0,18 %. The annual growth of return reached 30 % and the cumulated growth of return from 2002 to 2005 reached 233 %. The growth of turnover is based on the consumers demand increase which is however satisfied by the increase of imports.
The share of organic agriculture area on the total agriculture area reached in 2005 together 5,98 %. The main organic production commodities of the Czech farmers are cereals, herbs and condiments, meat, milk (goat milk in particular) and potatoes. A weakness of the Czech organic food chain is processing stage. There is not sufficient volume of processing capacity with respect to produced quantity. The main reasons are:
The market is too small, so that big conventional processors would be interested in. Financial requirements for separating of organic processing do not ensure return on investments. The activities of big processing plants in this sphere are rare.
Small processors do not dispose of funds for investments needed. Besides of that, strict hygienic standards practically eliminate traditional ways of processing and production on farms.
From the EU accession the import of organic foods increased significantly. The imports are focused on processed food products in particular sauces, spreads, beverages, sweeteners, oils and fats and on pulses, seeds and nuts. From 2005 also fresh goods is imported, in particular fruits and vegetables, milk and milk products. The most of imported food products come from Netherlands, Germany, Italy and Belgium.
Organic foods distribution ways
The main distribution ways are supermarkets and hypermarkets. Organic foods are offered there with production labels, however private labels start to be put on the market (Billa – Ja! Natürlich., Ahold – Hyp, Tesco – Tesco Organic).
The second important distribution ways are specialized outlets of health nutrition. These kinds of shops are situated in bigger cities predominantly.
Marginal number of organic foods is sold on farms, local markets, and in small foods shops. The new phenomenon is internet organic shops, offering wide assortment of this kind of foods.
Market share of particular kind of shops on the total organic food sales exhibits the table 7. The share of super- and hypermarkets reached 57 % in 2005, the share of specialized organic foods shops 37 %.
Organic foods prices
Significant part of consumers turns off shopping organic foods because of their price. As price comparison of conventional foods to organic foods is concerned, there are several aspects:

- The comparison is a moot point as for finding the equal qualities in both categories is difficult. The price difference is based just on the qualitative difference. One example for all: virgin and refined oil.
- The price difference is enlarged by many times extremely low price of conventional foods.
- High prices of organic foods are determined by low competition on organic food market which is connected with a low concentration of the distribution places.
- Low concentration of production and distribution contributes to increase of logistics costs.

An impact of all mentioned aspects is the organic food price level by 40 % to 350 % higher than the same of conventional foods.

Organic foods consumers

The higher price level defines the group of organic food consumers in the Czech Republic.

- Consumers liable to their health and to the environmental impacts of their behaviour.
- Mothers with children.
- High incomes consumers.
- Foreigners from developed countries.

Regional marks, specialities, very high value added products

Regional marks and regional specialities use their characteristic taste quality to come out of their assortment group and to address consumers. The position of the Czech food industry in this sphere has many reserves. Until now 3 products with this kind of protection were approved, another about 30 ones are discussed.

The market of very high value added foods exhibits more dynamics. Various kinds of semi-products, frozen ready foods, products with minimum time taking preparation etc. have a good perspective to establish themselves on the markets.

Promoting activities

Agri-food chain represents a multilevel system of links and relations which together create an environment of cooperation and competition. Who of the participants of the agri-food chain will be successful and who not is in large extent decided by the final participant of the chain, by the customer. This customer becomes the arbitrator of the whole chain and in the sharp competitive environment it becomes a target of a strong marketing campaign.

The best assumption to develop and to realize various marketing strategies and methods is on the side of strong capital subjects.

In fact, on the Czech food market, we can trace several main marketing streams.

- Marketing lead by marketing chains - focused predominantly on the low price.
- Marketing lead by marketing chains - focused on food quality products, however, in comparison of price promotion, less frequent.
- Marketing lead by the state institution - is focused on quality food products, however determined by the domestic origin of these products.
- Marketing activities of big producers.

Ad a. Marketing and promotion campaign lead by marketing chains in the Czech Republic is predominantly targeted on the low price. Such a kind of promotion is more or less persistent. Czech consumers tend to prefer the price to the quality. Most of marketing strategies of the chains are based on this consumer’s orientation, using:

- every day low price strategy (EDLP) combined with
- promotion actions (Hi – Lo strategy) for chosen products

The EDLP strategy represents strict conditions for suppliers which finally can have impacts to products´ quality. The activity “Marketing chains check” effected by the Food Chamber of Czech Republic in 2005 exhibited a lot of quality failures.

The promotion actions in Hi – Lo strategy press suppliers to extremely low prices. There is an usual practice that within the frame of these actions, such goods are supplied, which do not keep the usual standard quality. The final effect is loss of consumers´ confidence. In spite of that promotion actions are popular at Czech consumers.

Ad b. Promotion of quality food products by marketing chains is being lead time to time only and is focused before all on consumers of wine, cheese, organic meat and healthy nutrition. This kind of promotion does not reach the power of persistent price promotion.

Ad c. Marketing activities of The State Agricultural and Intervention Fund, reflecting increasing trend of foods imports, are based on the good relation of Czech consumers to the domestic foods and on the willingness to buy them. There are two pivotal marketing programmes for the support of the foods of domestic origin, called „Značka Klasa“ (Klasa mark) and „Najdi si svého výrobce“ (Look for your producer). Both programmes are focused on the identification and promotion of domestic foods by domestic consumers.
Značka Klasa. This programme provides certification of the chosen foods with the Klasa mark. This mark is lent to the producers after fulfilling strong qualitative criteria's including domestic origin and is a guarantee of the quality. This mark is lent for the period of three years with a possible prolongation and all the period the certified goods are followed by the State Agricultural and Food Inspection. All the foods certified with Klasa mark are included to the promotion programme of the State Agricultural and Intervention Fund. The accordance of Klasa privilege is now determined by the domestic origin, however the change of criteria's are being discussed so that this mark would be granted irrespective of the country of origin. In the future this mark should represent high quality foods products. On 9th January 2007 together 1340 food products from 191 producers were certified.
Look for your producer. This programme is a register of Czech food producers, which should help to the consumer with the better orientation on the food market. The register is on internet sites. In the first step the consumer can find information about the concrete product, in the second step he can make a query, the response of which is available to all register users.

Ad d. Promotion of foods made by processors themselves is predominantly focused on promotion of innovated products. The methods used in the Czech Republic corresponds to usual approaches, besides of advertising in mass media, processors organise various promotion actions directly in shopping places supported by tasting etc.

Results - Quality food products perspectives on the Czech market

For the establishment of the quality food products on the Czech market it is necessary to draw consumers' attention for the high quality, to describe the advantage of this quality and to persuade the consumer to pay for this quality. For this sake following procedures are supposed to be improved:

- the consumers´ know-how
- distribution channels
- assortment

Ad a. With respect to the fact that the favourable shopping places of foods are marketing chains stores, the significant part of the information campaign reclines upon these subjects. The time to time promotion of QFP should change to continuous promotion. While the specialized QFP shops are visited purposefully by consumers informed and interested, marketing chains should use the chance to address consumers being not informed or not interested until now.

- In promotional leaflets focused on low prices there could be regularly presented QFP columns including besides of the offer also explanation of concrete quality food product advantage.
- Within the frame of supermarkets there could be established special section with counter sale with high professional staff. Especially the qualification of the service staff seems to be an actual point of issue. A considerable deterioration of service staff hangs together with the boom of marketing chains. Qualified and well informed service would support the QFP sales.
- Tasting promotions provide a chance to persuade the consumer. Also here the qualification of the staff involved is one of the basic elements of the success. Usually tasting promotions made are realised by temps with missing precise knowledge of the offered assortment.

Ad b. Traditional retail distribution channels should have a competition in the distribution chains reflecting shopping trends amendments.

- Shopping centres displaced on the edge of town handicap non motorized consumers and exclude quick shopping. Convenient shops situated in consumer's residence should profit of the allocation and of the qualified service granted by qualified staff. There are also indispensable social aspects of consumers´ residence shops. With respect to the fact that with the boom of marketing chains centres an important part of small residential shops dissolved and that consumers were used to such a kind of shops, we propose that there is a space for convenient shops.

- The number of consumers, who want to spend a minimum time by shopping, is growing. From this point of view, non traditional distribution places, as e.g. petrol stations, represent a chance. Here is a space for foods with very high value added for direct consumption.
- Quality foods products should benefit from the consumers´ preference of shopping centres by establishing of specialized shops allocated in the shopping galleries.

Ad c. Trends of shopping behaviour development should be respected by the foods assortment.

- The aim to spend a minimum time by shopping forms a space for "easy to prepare" foods. In this category there is an opportunity for a large assortment scale, many taste variants etc.
- The introduction and building a mark means to distinguish the product from the other products competing by a characteristic feature. A range of Czech established and traditional marks died out in a period of transformation of property rights of the processing plants. These effects were negatively accepted by the consumers. If we consider the contemporary wide assortment supply, we suppose that there is a space for original marks as a guideline for consumers´ orientation on the market.
- Organic foods and health nutrition foods come to awareness of Czech consumers. Bigger competition would reduce the price which finally would contribute to their marketability.

Final remarks - conclusions

Development of foods distribution network is one of the factors, which significantly affects the foods demand, it participates on the changes of consumers´ shopping behaviour in the shopping place choice, shopping conditions requirements and other shopping aspects. The development of large area stores and shopping centres in the Czech Republic evoked a significant influence of the multinational marketing chains on the Czech consumers.

The prices of foods on the Czech market are dropped by high saturation of the market with the impacts to the assortment competition and to the competition between particular chains. Aiming to reduce the costs, some of processors choose the way by the minimization of costs, detriment to foods quality. On the other hand there is a group of producers, preferring the way by introducing and establishing quality foods products.

Promotion of marketing chains is predominantly focused on low prices, while promotion of quality food products has many reserves. The Czech consumers are sensitive on the price amendments in spite of the growth of consumers´ incomes. However this does not mean that the can not understand the quality. The share of consumer preferring quality foods products is increasing.

Generally it is evident that the goods of both sides of price spectrum go on the market by the best, while the interest for products in the middle of price level is not so intensive. With a proposed further growth of consumers´ incomes we can prospect that the consumers demand will incline to high quality foods products. The support on the level of production should consist in assortment innovations. The reserves on the retail level consist in promotion in favour of quality foods products, qualified staff and better shopping accessibility. With respect to significant reserves in all these aspects we propose that the perspectives for quality foods products on the Czech market are good.

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Tables

Table 1: Food consumption in the Czech Republic (kg/head/year)

	2004	2005	Index 05/04
Meat total (carcass weight)	80,5	79,7	99,0
- bovine	10,3	8,7	84,5
- veal	0,1	0,1	100,0
- pork	41,1	41,0	99,8
- poultry	25,3	26,1	103,2
- other	3,7	3,8	102,7
Fish	5,5	5,5	100,0
Milk and milk products in milk equivalent excl. butter	230,0	238,2	103,6
Eggs	13,7	13,7	100,0
Butter	4,6	4,7	102,2
Lard	4,7	4,7	100,0
Vegetable fats and oils	16,0	16,1	100,6
Sugar refined	42,6	41,6	97,7
Cereals in flour equivalent without rice	105,6	106,0	100,4
Potatoes	73,0	73,0	100,0
Pulses	2,1	2,1	100,0
Vegetables in fresch equivalent	79,8	81,0	101,5
Mild zone fruits in fresh equivalent	50,3	49,0	97,4
South fruits	33,5	33,0	98,5

Source: Ministerstvo zemědělství ČR, Zpráva o stavu zemědělství za rok 2005

Table 2: Main shopping place for foods (% of answers)

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Hypermarket	1	4	16	20	29	30	37	35	36
Supermarket	24	26	23	30	26	21	19	20	15
Small self-service shop	49	41	32	22	20	23	18	20	17
Counter shop	13	12	10	8	5	5	5	3	5
Cash and carry	.	.	.	.	.	2	2	1	3
Discount	9	13	15	17	18	18	19	22	23
Other kind	4	4	5	3	2	2	0	0	1

Source: INCOMA RESEARCH, Praha; GfK Praha, Shopping Monitor

Table 3: Marketing chains preference by shopping of foods (% of answers)

Retail chain	Preference
Kaufland	16
Penny Market	9
Plus Diskont	8
Tesco hypermarket	7
Jednota	7
Albert	6
Hypernova	6
Lidl	4
Delvita	4
Billa	3
Carrefour	3
Globus	3
Hruška	3
Interspar	3
Makro	3
Other	15
Total	100

Source: INCOMA RESEARCH, Praha; GfK Praha, Shopping Monitor

Table 4: Satisfaction with frequency of domestic products on the market (% of answers)

	1999	2000	2001	2002	2003	2004	2005
Very satisfied	42,2	40,6	39,8	47,2	48,3	45,2	40,8
Rather satisfied	48,4	50,1	54,2	46,6	44,9	47,9	48,8
Rather unsatisfied	7,7	7,8	5,8	5	3,7	3,9	5,2
Very unsatisfied	0,1	0,2	0,2	0,1	0,5	0,2	0,4
No answer	1,6	1,3	.	1,1	2,6	2,8	4,8
Total	100	100	100	100	100	100	100

Source: INCOMA RESEARCH, Praha; GfK Praha, Shopping Monitor

Table 5: Satisfaction with frequency of brand products on the market (% of answers)

	1999	2000	2001	2002	2003	2004	2005
Very satisfied	28,2	32	30	36,3	38,3	33,7	27,1
Rather satisfied	57,2	54,4	58,8	50,7	49,7	52,9	55,6
Rather unsatisfied	10,2	10,6	10,2	10	7,7	8,7	10,7
Very unsatisfied	0,8	1,2	1	1	0,7	1,1	1,2
No answer	3,6	1,8	.	2	3,6	3,6	5,4
Total	100	100	100	100	100	100	100

Source: INCOMA RESEARCH, Praha; GfK Praha, Shopping Monitor

Table 6: Satisfaction with shopping conditions by shopping of foods (% of answers "very satisfied" and "satisfied")

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Oppening time	96	96	94	97	97	98	97	97	96	94
Assortment scale	88	91	91	93	93	95	95	95	92	92
Prices	67	66	72	84	81	84	86	90	86	86
Freshment and quality	91	90	91	94	95	96	95	95	93	91
Cleanness	94	90	88	94	94	96	94	94	93	90
Pleasant staff	90	91	90	92	93	94	90	90	87	86
Service quickness	86	86	81	85	85	88	84	84	84	81

Source: INCOMA RESEARCH, Praha; GfK Praha, Shopping Monitor

Table 7: Market share of particular kind of shops on the total organic food sales in 2005 (in %)

	Market share
Super- and hypermarkets	57
Specialized organic foods shops	37
Small foods shops - unspeciallized	2
Other - farms local markets, internet	4
Total	100

Source: Green marketing, Český trh s biopotravinami 2005

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