ORIGINAL SCIENTIFIC PAPER

RECEIVED: NOVEMBER 2018

REVISED: FEBRUARY 2019

ACCEPTED: FEBRUARY 2019

DOI: 10.2478/ngoe-2019-0003

UDK: 339.187.4:633/639

JEL: Q02, R11

Citation: Bertalan, L., Inzsöl, R., Hegedüs, J., & Jankó, F. (2019). Quo vadis Farmer Sales? The Experience of a Survey in Hungary. *Naše gospodarstvo/ Our Economy, 65*(1), 30-39. DOI: 10.2478/ngoe-2019-0003

Quo vadis Farmer Sales? The Experience of a Survey in Hungary

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Abstract

Direct sales by farmers gained acceptance in Hungary following the incursion of healthy eating and the enhancement of local economic development efforts. Conducting questionnaire surveys and interviews, our research investigated the means through which locally produced goods reach consumers, e.g., short food supply chains, as well as the farmers' motivations and the necessary developments. According to the main results, personal direct consumer relations are vital for local farmers; however, advanced sales channels are not popular nor fully developed in Hungary. Only the capital city shows some development here, catalysing and stimulating the domestic market and consumer behaviour. On the other hand, the age structure of local farmers or the lack of knowledge hinder the advent of advanced sales channels. Nevertheless, there is a continuous and immanent need for development in this sector; although, the recent conditions of subsidies unfortunately do not support small scale local farmers.

Keywords: short food supply chains, local farmers, direct sales, foodstuff communities

Introduction

In the past decades, global commodities, as established by leading multinational companies, have enabled access to food from just about any point in the world. Beyond sustainability and environmental problems, these so-called global "agro-food regimes" or "systems of provision" raise the questions of the origin of food and, thus, their composition, producing, and processing (Whatmore, Thorne, 2008). While one of the foundations of a consumer society is the easy and high-quantity

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**NAŠE GOSPODARSTVO
OUR ECONOMY**

Vol. 65 No. 1 2019

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access to food, in the course of the conscious, or ethical, consumption, there is an ever-growing need for high-quality, environmentally produced, possibly local food containing natural ingredients. Local supply chains were thus put in the centre of attention (Low et al., 2015; O'Hara, Pirog, 2013). Considering its history, direct sales live their renaissance both globally and in Hungary because small-scale farmers are able to meet such increasing market demands with their high added-value goods, which global supply chains are incapable of (Galli, Brunori, 2013; Kneafsey et al., 2013).

The main aims of the study were to measure the channels small-scale farmers use to sell their products in the Hungarian context. Regarding our hypotheses, developed forms of direct sales are not widespread among Hungarian farmers, except for in the local markets. The authors deemed it important to analyse the arising needs in order to make direct sales more efficient and viable as well as the development of ideas local goods producers have in Hungary.

Local Food Trends: Indirect and Direct Sales Forms

Research was conducted in regard to the definition of local and short food supply chains in the international and in the related Hungarian literature (Marsden, 2000; Murdoch et al., 2000; Renting et al., 2003; Nihous, 2008; Balázs, 2012; Juhász, 2012). Several definitions, such as alternative, local, or new food chains/networks, are known. The term "short food supply chain" (SFSC) is generally used in the European Union. In accordance with the definition of Renting et al. (2003) in the case of short food supply chains, there is a direct and mutual contact among the participants with the aim of producing, processing, selling, and consumption of food. Murdoch et al. (2000) describe the renewal of the food supply system where bottom-up cooperation is the driving force behind it.

Based on the above notions, the main point of the short food supply chain is the shortening of communication and contact between producers and consumers, and there is a minimal number of mediatory organisations. Participants organise themselves in networks or communities with the aim of fostering direct sales of food production in competitive quantity and excellent quality, along with the popularisation of conscious purchasing and the strengthening of producer cooperation.

Several sales channels can be differentiated, i.e., traditional market sales, on-farm sales, or the more modern, community participation-based systems (e.g., community supported agriculture – CSA, box schemes, etc.), which are already popular in the USA and Western Europe (Berti, Mulligan, 2016; EPRS, 2016). It is characteristic, then, that farmers use several sales methods at the same time (Ilbery et al., 2006). However, the participation of small producers in advanced commodity chains is rather low in Hungary at the moment (Szabó, 2014).

The most wide-spread channels of direct sales in Hungary are traditional and farmers' markets (Juhász et al., 2012; Csikné Mácsai, 2014; Kujáni, 2014; Szabó, 2017). The most striking difference between these forms of sales in the Hungarian practice are the following: while traders can appear on the traditional markets with their wholesale goods (not only food-like, but any product can be sold), farmers' markets only allow small producers to sell the products they produced and processed themselves. There is also a difference in regional limitations. According to the legislation producers, selling their own goods at farmers' markets must operate in the given county or within a catchment area of 40 km; however, in the case of traditional markets, there is no such limitation. Products can be delivered to Budapest, the capital of Hungary, from all over the country. However, the international borders are barriers for this activity; sales in the neighbouring countries are too expensive for local producers and hindered by the legal environment.

There is a continuous decline in the turnover and visitor numbers of traditional markets, and there is also a change in the range of their customers. The rate of visitors dropped from 72% (2010) to 59% (2016). This drop back is mainly the result of the lack of buyers from outside the capital seat, while the number of households from Budapest frequenting these events can be considered as stable (GFK, 2016). The turnover of markets has been taken over by discount chains and hyper – and supermarkets. The decrease of the shares of markets for everyday consumer goods can be led back to the fact that buyers wish to do their shopping in one place in a simple and quicker way.

Following the favourable legislation and subsidy policy environment, along with the advance of local products, there is national growth in the number of farmers' markets in Hungary (Szabó, 2014). The Hungarian Program for Rural Development devoted € 2.767m for the support of agricultural production and food processing. Accordingly, similar EU-funded or national grants for rural development will be hereafter considered as subsidies in the paper. Szabó (2017) showed, using the registers of the Hungarian Chamber of Agriculture, that 118 markets were registered as farmers' market in the year 2012; by the year 2018, this number increased to 256. The spreading of farmers' markets was bolstered by the increase of consumer needs (Szabó, 2014) and the local and EU subsidy systems. Visitors to farmers' markets are younger and more educated consumers who favour healthy and domestic products. As a result of the

change of consumer attitudes, there are buyers whose responsible decisions are made with due respect to the positive impacts of their own health and the health of their families as well as to the local economy, community, and environmental sustainability. This group of consumers particularly favour locally produced foods and direct sales channels (Chambers et al., 2007; Póla, 2014; Gonda, 2014; Gulyás, 2017). The fresh, local goods, the unusual regional variants, friendly chats, and the multitude of people mean more than just buying for many people; it is an experience that makes the next farmers' market a worthy visit (Hunt, 2007; Robinson, Farmer, 2017).

This group of solvent consumers who make their decisions consciously are important when it comes to the spreading of more modern direct sales channels. There are more and more online purchaser communities, and there are some vegetable-box schemes in Hungary (Benedek, 2014). According to a survey[1] of the Hungarian Association of Conscious Buyers, there were at least 17 community-supported agricultural groups (CSA)[2] and five box schemes[3] in Hungary in the year 2017; further, 47% of the CSAs, 80% of the box schemes, and 15% of the purchaser communities delivered goods to Budapest, which shows the strong dominance of the city (Table 1).

Research in Hungary dealt with the mapping of various direct sales fields (Juhász et al., 2012; Csikné Mácsai, 2014; Kujáni, 2014; Benedek-Balázs, 2016; Szabó, 2017). The presence of the modern sales channels among small-scale farmers was analysed in the course of the present study.

Methodology

In the course of the research, we involved the entire area of Hungary. We received 118 assessable questionnaires filled in by small-scale farmers active in the field of producing local goods of food. The survey was conducted between March 2016 and June 2016. The questionnaire contained 26 questions, which were forwarded via social media (Facebook) and contact addresses received from vocational associations. Some questionnaires (11) were conducted by the authors *in situ* at traditional and farmers' markets (Table 2). Furthermore, we interviewed a few market organizers and intermediate actors selling local products (6).

Younger farmers with a higher level of education were over-represented assumedly because of the online questionnaire form. This equals the general practice, as international research shows that farmers of short food supply chain sales are younger than the average and have a higher level of education (Martinez et al., 2010).

The vast majority of respondents pursue their activities as agricultural producers[5] (66%), i.e., 14% as family farms,[6] 12% as individual entrepreneurs, while the remaining 8% were for-profit and nonprofit economic organisations

[1] https://tudatosvasarlo.hu/cikk/mukodo-kozossegi-mezogazdasagi-csoportok-bevasarlokozossegek

[2] According to the US Department of Agriculture, a CSA consists of a community of individuals who pledge support to a farm operation so that the farmland becomes, either legally or philosophically, the community's farm, with the growers and consumers providing mutual support and sharing the risks and benefits of food production (Woods et al., 2017).

[3] The definition of shopping communities and box schemes originates from the CSA. In the case of box schemes, the shopper purchases a box of goods every week, or a defined period of time, which was produced at the given farm. Consumer commitment is smaller in this case because the decision can be made to buy the box or not. In the case of buyer communities, consumers can decide what and how much to purchase at a given time on the basis of a list.

[4] A vending machine is an automated machine that provides products, typically fresh milk, from local producers, located in several points of the city.

[5] In accordance with the Hungarian law, an agricultural producer is a private person above the age of 16 who is not an individual entrepreneur and who carries out activities to produce given goods in their individual field of agriculture.

[6] In accordance with the Hungarian law, an enterprise utilising a maximum of 300 hectares of arable land, occupying at least one family member, and enlisting the contribution of the other family members is a family farm.

Table 1. Traditional and Modern Kinds of Direct Sales Channels

Traditional Direct Sales Channels	Modern, Direct Sales Channels
traditional town markets	farmers' market
fair	festival
on-farm sale	community supported agriculture
own guesthouse	online shopping communities, shopping bag-like sales
own shop	operating one's own web shop
Pick your own fruit!	vegetable box schemes, weekly shopping bag
street-selling	vending machine[4]
mobile delivery	
home delivery	

Source: HRDP (2015), Short Supply Chain Thematic Subprogram, p. 78 (edited by the authors)

Table 2. Distribution of the Sample According to Gender, Age, Education, and Form of Agriculture

		Number of Answers	Proportion
Gender	male	67	56.8%
	female	51	43.2%
Age	under 35 years	18	15.3%
	36-45 years	40	33.9%
	46-55 years	34	28.7%
	56-65 years	19	16.1%
	over 65 years	7	5.9%
Education	elementary	2	1.7%
	intermediate, but not agricultural	25	21.2%
	intermediate, agricultural	25	21.2%
	degree, but not agricultural	38	32.2%
	degree, agricultural	28	23.7%
Form of agriculture[8]	animal farming	37	17.0%
	vegetable farming	53	24.3%
	fruit farming	53	24.3%
	gardening	30	13.8%
	viticulture	21	9.6%
	silviculture	4	1.8%
	apiary	20	9.2%

and small producers.[7] Small-scale farmers constituted the majority of the respondents who occupied themselves with agriculture as a complementary activity.

The authors received assessable answers from all Hungarian counties. Two small border settlements from Slovakia, mainly with an ethnic Hungarian population, also submitted filled-in forms. We considered these as relevant data because native Hungarian producers usually sell their products on the Hungarian side of the border (as it came out during the personal survey). However, on the basis of the above-mentioned notions, the survey cannot be considered as representative; thus, conclusions could only be drawn on the basis of our sample.

Results

Sales Channels

The sample-based research of direct sales resulted in the on-farm direct sale to the consumer to be the most popular form; 76.3% of the respondents mentioned they sold their goods this way. This was followed by the traditional market sale (39.8%), and home-delivery (28.8%). It was interesting to see that only eight farmers (6.8%) sold their products within the frame of the previously popular "Pick your own products" form. Respondents were able to mark several options, and the above-mentioned forms are the most popular, i.e., traditional sales forms. Hence, own shops and own guesthouses are not, i.e., not characteristic among respondents (Figure 1).

The advanced means of direct sales, except for the local markets, are less widespread among the interviewed farmers (Figure 2). Even though the sample contains the widely disputed community-supported agriculture (two farmers) and the box schemes (nine farmers), which are popular abroad; however, as the chart shows, only a small part of their profit is generated via these channels (apart

[7] A natural person who sells his/her basic products and the goods produced thereof originating from one's own farm by upholding quantity-based and territorial limitations to end-consumers on-farm, at markets, fairs, events, or are parts of small-trade and catering units, which sell his or her products directly to consumers are considered small producers.

[8] Some farmers are cultivating simultaneously more forms of agriculture; therefore, we received 218 answers and not only 118.

Figure 1. Traditional Direct Sales Channels among the Respondents, in Ratio Groups of Total Sales, % of Respondents

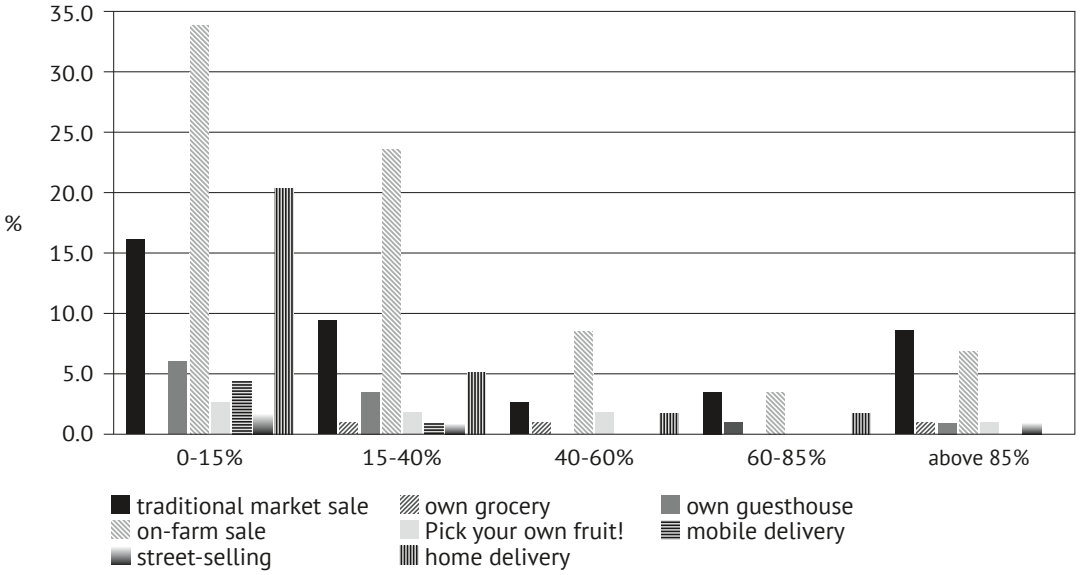
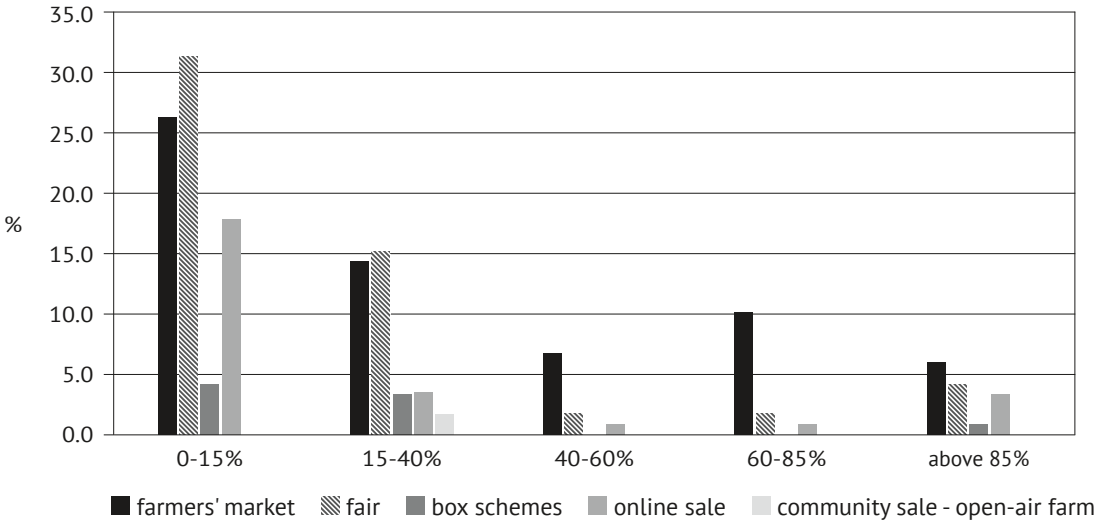


Figure 2. Advanced Direct Sales Channels among the Respondents in Ratio Groups of Total Sales, % of Respondents

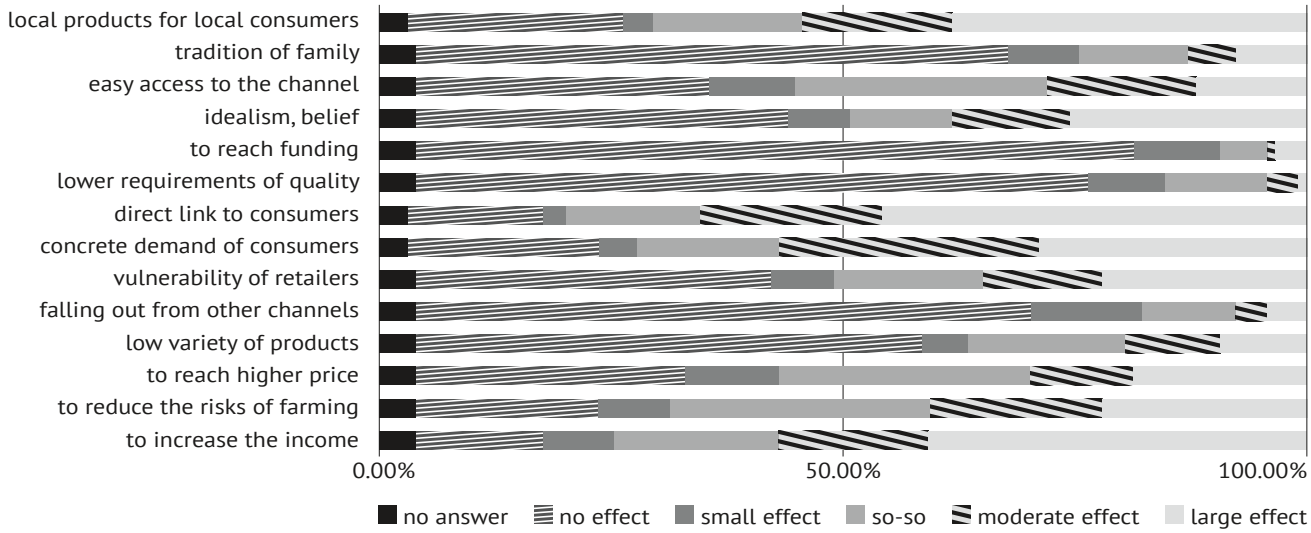


from one farmer). None of the 118 respondents sell their goods from vending machines.

The interviewed farmers do not almost sell to Hungarian – or foreign-owned warehouses or discount chains. The main reason hereof is the insufficient amount of goods produced to meet the demands of those purchasers.

The survey also investigated why farmers opt for direct sales (Figure 3). It is an important aspect of each profit-oriented activity; just like with direct sales, farmers should be able to provide a living for themselves and their families (40.7%). At the same time, the greatest motivation of the respondents was to personally give the customer their carefully produced goods (45.8%); hence, this came before a profit-gaining motivation. It is typical for small-scale farmers to engage in these activities parallel to their primary occupation. The respondents considered it as their almost sacred mission to put healthy, traditionally produced goods onto the tables of their customers. They often launched their sales to meet a specific consumer demand. These farmers had scarce access to these subsidies; hence, the motivation of EU-subsidies was almost noninfluential (77.1%) when they started their activities and also at the time of responding to the survey. The less-strict quality requirements toward small-scale production goods (72%) were not seen as motivation, either; therefore, this was not the reason for choosing direct sales. However, the authors were confirmed that producing quality goods is of importance. It was also interesting to note that continuing family traditions was also listed among the nondefining motivating factors.

Figure 3. Factors Influencing the Initiation of Direct Sales, %



The interviewed farmers were open to the use of modern marketing methods; 50% already have a homepage, and 42% have regularly been posting Internet advertisements. Advertising on fliers (33.9%) and social media (33.1%) were also favoured forms of advertising; 18.6% appeared in a local farmers' publication; 14% advertised on the webpage of a mediatory organisation; and 14% joined local product trademarks. It could also be observed that the process has started, which guides farmers toward a short food supply chain coordinating civil organisation (SFSCs-organiser), so that their activities and market-presence can be more efficient. At the same time, the vast majority of the interviewees did not utilise external assistance in the form of legal assistance, or EU subsidies in order to launch or sustain direct sales. The rate of farmers who still did not use marketing tools at all is high (22%). This can be for several reasons: on the one hand, there is no need for it because of the small quantity of products, as produced goods can be sold; on the other hand, farmers also have to combat a continuous lack of capacities (financial, human resources).

Development Ideas, Farmer Needs

Farmers were also asked about their development ideas for the next five to 10 years. Almost 10% of the respondents do not plan a development in the future. There are several reasons behind this: on the one hand, several respondents do not wish to develop their farms because of their age; on the other hand, they are satisfied with the present profitability, or they are about to reach the end of their capacities. The innovation capacity and tool development ideas are minimal, assumedly because of the small-scale complementary activity. Thus, only 13.8% of respondents plan a technological modernisation, automatization, and an increase of production capacities (e.g., expanding the number of livestock, planting crops, purchasing new land). Nearly 10% of the sample plan to purchase tools and characteristically wish to utilise subsidies. Farmers in the sample also mentioned the search for new marketing channels and the expansion of the buyers' range (7.9%) and a more intensified marketing activity (5.9%) among their goals. The development ideas included the stability of the farms and diversification of income sources and of activities (starting catering, creating rural tourism and show-farms). The idea of recruiting a new workforce was not characteristic (1.3%).

According to the farmers' suggestions to increase efficiency of direct sales, it became obvious that respondents consider the intensive and targeted marketing activity as the most important tool. This was followed by emphasis on the importance of consumer mind-framing as well as the restoration and increase of customer trust. Marketing was, in many cases, deemed important because of mind-framing. National campaigns were believed to be useful to draw the attention to the consumption of local goods from economical, health, and environmental aspects. The suggestions on efficiency increase made by farmers included the reduction of bureaucracy and a re-thinking and easing of regulations related to farmers and the strengthening of cooperation and establishing SFSC groups among farmers. Less than 10% of respondents believed that local markets are not run appropriately, as traders often appear to mislead consumers and can undermine the easy-to-shatter trust into local products. Many of the respondents thought that calls and state subsidies do not provide a solution for bolstering direct sales (Figure 4).

Fourteen percent of respondents were of the opinion that there is absolutely no need of subsidies for sustaining or

Figure 4. Farmers' Suggestions to Increase Efficiency of Direct Sales

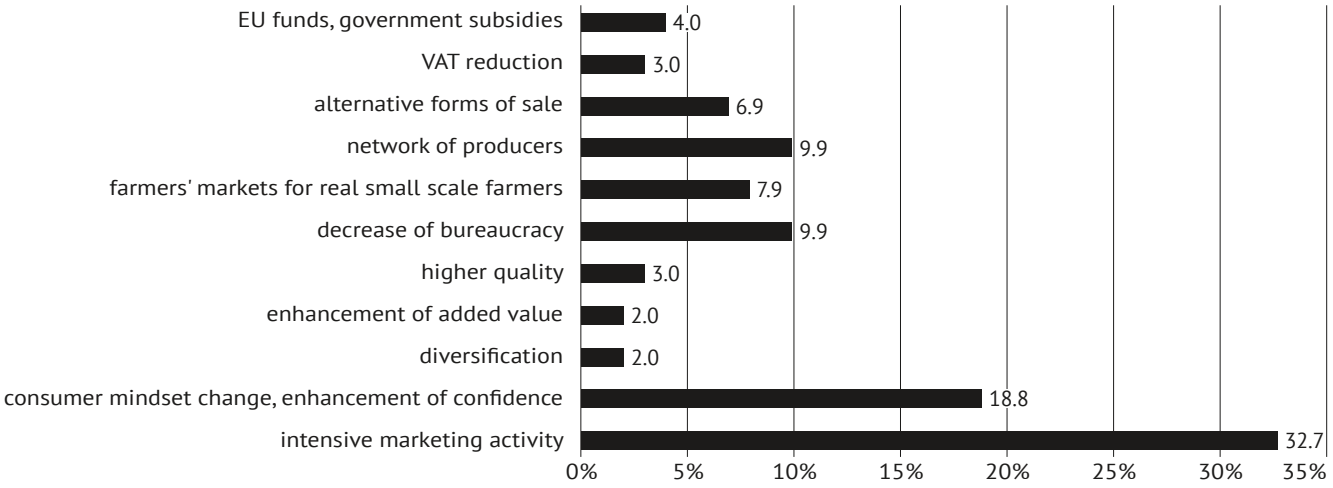
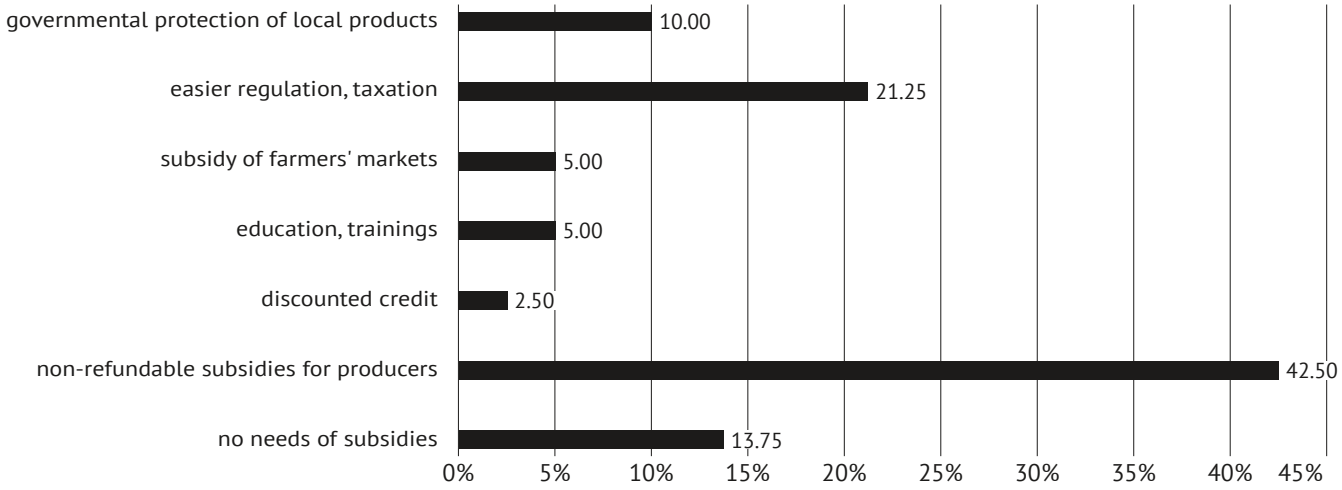


Figure 5. Farmers' Suggestions about the Forms of Subsidies Necessary to Increase Viability



improving their viability (Figure 5); 43% believed that subsidies should be rearranged to make them available and suitable for small-scale farmers. Participants in the survey did not have access to the present calls in most cases. Reducing the administration burdens and a simple access would be important. The applications should include the possibility to purchase used tools; further, low-budget projects (€ 300 – 500) should also become implementable. Farmers with land less than 1 hectare should also be able to receive subsidies. Approximately 17% of the respondents believed that present regulations hinder their operation or even make it impossible; 10% believed that the protection and the positive discrimination of domestic products can help on a national level against imported goods. Education programs for local farmers, creation of further local markets, or the support of on-farm selling practices can also improve the viability of the farmers; however, these options were seldom considered (5% – 5%).

Conclusions

Based on the survey, we underscore that selling on local markets and on-farm scale are the most widespread methods of direct sales among the questioned farmers. The establishment of direct, personal contacts to the consumers is a major factor behind launching an enterprise, i.e., Hungarian small-scale farmers are keen to sell on markets and on-farm to react to consumer demands and consider it important to bring their goods to local inhabitants.

The change of perspective among consumers and farmers is inevitable to boost the local food supply. Considering the advanced forms of selling, like community farms, box schemes, and online shopping communities, Hungary is lagging behind compared with the rest of Europe. Operating communities can be found in larger cities and Budapest, which draw away the farmers who are prepared and open to alternative means of selling from local direct sales channels. Hence and paradoxically, the principle of "local food for local people" is rarely met; peripheral rural areas could be sometimes considered as rural "food deserts," as one form of environmental or food justice. The level of consumer consciousness necessary for the long-term sustainability of shopping communities based on loose farmer–consumer relations, requiring less commitment, can only be regarded as appropriate in Budapest.

However, it is also important to note that farmers are also not fully prepared and open to answering the question. Elderly farmers working in the field as a complementary activity favour rather traditional markets and on-farm selling. They do not have the proper knowledge in many cases about the conditions and pitfalls of starting and operating new forms of selling. Subsidies relevant to these activities are either inaccessible to them, or they fear to utilise them (mainly because of administrational burden and the fear of overextension). They also characteristically do not see the solution of bolstering direct sales but consider the coordinated and intensive marketing to be more important.

The importance of the moderator and aspect-shaping role of cooperating organisations is obvious. Conditions for the spread of advanced, direct sales channels is created and sustained by civil organisations, local governments, or perhaps by the entrepreneurs. Development policy has allocated vast EU resources to the domestic adaptation of the SFSCs concept and the development of local farmers and selling channels. Calls, however, must be built on the needs of those involved in order to a proper utilisation of the subsidies. It is a question of whether Hungarian small-scale farmers are capable of utilising EU subsidies and whether rural development subsidies can be matched with the demands in a way that the capacities, knowledge, and openness of small-scale farmers toward the direct sales can be expanded.

Acknowledgment

The research was supported by the Agrárklíma.2 – VKSZ_12-1-2013-0034 project (Bertalan), by the ÚNKP-18-3-I New National Excellence Program of the Ministry of Human Capacities (Hegedüs) and by the EFOP-3.6.1-16-2016-00018 project (Jankó).

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Kam greš, prodaja kmetovalcev? – Izkušnja anketiranja na Madžarskem

Izvleček

Neposredna prodaja kmetovalcev je na Madžarskem pridobila pomen, kar je sledilo poudarjanju zdravega prehranjevanja in krepitvi prizadevanj za lokalni ekonomski razvoj. V svoji raziskavi smo z anketami in intervjuji proučevali načine, s katerimi lokalno proizvedeno blago doseže potrošnike (npr. kratke oskrbne verige s prehrano) kot tudi spodbude kmetovalcev in potreben napredek. Glede na ključne izsledke so osebni, neposredni odnosi s potrošniki bistvenega pomena za lokalne kmetovalce, medtem ko napredni prodajni kanali na Madžarskem niso razširjeni in razviti. Na tem področju kaže nekaj napredka samo glavno mesto, ki katalizira in spodbuja domači trg in vedenje potrošnikov. Po drugi strani pa starostna struktura lokalnih kmetovalcev in pomanjkanje znanja otežujeta nastanek naprednih prodajnih kanalov. Kakorkoli, obstaja kontinuirana in imanentna potreba po razvoju v tem sektorju, čeprav trenutni pogoji subvencij na žalost ne podpirajo malih lokalnih kmetovalcev.

Ključne besede: kratke oskrbne verige s prehrano, lokalni kmetovalci, neposredna prodaja, živilske skupnosti