Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter

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Publication date:
2009

Document version
Publisher's PDF, also known as Version of record

Citation for published version (APA):
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ISBN 978-87-92087-95-9 (on-line, Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter)
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Preface

In 2005, the Danish government initiated the research programme “The Food Sector of the Future” (Fremtidens Fødevaresektor). The present report is an outcome of collaboration between three projects on meat safety funded by the programme: CAMPY, DECONT and QUALYSAFE.

In the report the authors aim to provide an economic overview of market shares and trends in the Danish markets for pork, chicken and egg, as well as an overview of the main microbiological food hazards in Denmark in terms of Salmonella and Campylobacter associated with different product categories.

The novelty in the work is the attempt to link information about market sizes and trends in these markets and knowledge about different hazards from publicly available statistics. Thereby, the report seeks to assess the relative importance of the different zoonotic hazards and to assess whether trends in consumption patterns give rise to increasing pressure on food safety.

The report is prepared by Tove Christensen, Sigrid Denver, Jørgen Dejgaard Jensen, Hanne Rosenquist, Anne Wingstrand, Søren Aabo, Bertel Ifversen. In addition, thanks are due to a large number of people who have provided very helpful information - none mentioned, none forgotten.

I want to thank the authors, and in particular the lead author Tove Christensen, for undertaking and successfully completing this important and very difficult task.

Frederiksborg, November 2009

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Consumption patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter
Summary - dansk

Forbrugsvaner og zoonotiske risici –
En oversigt over Salmonella og Campylobacter risici fra svinekød, kylling og æg

Resumé

0.1. Indledning

1 Salmonella og Campylobacter er zoonotiske bakterier dvs. bakterier der kan overføres mellem dyr og mennesker.

Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter FOI 7
Nærværende rapports bidrag består i at give en overordnet beskrivelse af samspillet mellem risici for infektioner med Salmonella og Campylobacter på den ene side og danskernes forbrug af kød og æg på den anden side. Fremgangsmåden er at udnytte informationer om forbrugsvaner og udvikling i markederne for animalske produkter og sammenholde disse med udviklingen i omfanget af salmonellose og campylobakteriose samt smittekilde data for Salmonella bakterier.

For at få et bud på risikoen forbundet med at sætte tænderne i en kylling, et stykke svinekød eller et æg, er det nødvendigt med en række input. Først og fremmest, er det nødvendigt at kende omfanget af humane tilfælde forårsaget af henholdsvis Salmonella og Campylobacter. Salmonellatilfældene bliver så vidt muligt fordelt på produkter, og på om produkterne er dansk producerede eller importerede. Dernæst har vi brug for at kende eventuelle forskelle i zoonotiske risici i henholdsvis svinekød, kylling og æg, hvor vi ligeledes skelner mellem henholdsvis danskproducerede og importerede produkter. Herudover har vi også forsøgt at få et overblik over dokumenterede forskelle i risici i kød og æg fra forskellige produktionssystemer (eks. økologisk vs. konventionel) og forskellige forarbejdninger (eks. kølet vs. frost). Sist men ikke mindst, inddrages oplysninger om danskernes forbrug af forskellige typer af kød. På baggrund af disse data har vi forsøgt at opsommere sammenhænge mellem produktkategorier og zoonotiske risici for herigennem at give et fingerpeg om, hvilken betydning forbrugernes præferencer for forskellige produktkvaliteter har for den offentlige sundhed (og dermed for de samfundsmæssige omkostninger forbundet med sygdom).

Rapporten er afgrænset til at fokusere på svinekød, kylling og æg. Derfor behandles oksekød og andre typer fjerkræ end kylling kun nødtørftigt, hvor det forekommer na-

---

2 I 2005 finansierede Ministeriet for Fødevarer, Landbrug og Fiskeri forskningsprogrammet "Fremtids Fødevaresektor". Nærværende rapport er knyttet til projekterne CAMPY (at bekæmpe Campylobacter i fjærkræ), DECONT (at minimere risikoen for bakterieinfektioner fra svinekød’) og QUALYSAFE (at udvikle nye fødevaresikkerhedsstrategier for produktionssystemer for animalske fødevarer), se http://ferv.fvm.dk/Projekter.aspx?ID=33727

3 Smittekilde data for Campylobacter bakterier er endnu ikke til stede.

4 I nærværende rapport benyttes antallet af sygdomstilfælde som en indikator for de samfundsmæssige omkostninger forbundet med Salmonella og Campylobacter.
turligt for at opnå et helhedsbillede. Rapporten er opbygget på følgende måde: Efter indledende bemærkninger (kapitel 1), gives en overordnet beskrivelse af sammensættningen af fødevarerproduktionen (kapitel 2). De efterfølgende tre kapitler fokuserer på at beskrive forbrugsmønstre samt vigtigheden af handel med udlandet for henholdsvis svinekød (kapitel 3), kyllingekød (kapitel 4) og æg (kapitel 5) hvorefter kapitel 6 forsøger at opsummere og perspektivere. Databeskrivelser er henlagt til appendiks.

0.2. Humane tilfælde


0.2.1. Salmonella

Tabel 0.1. Fordeling af registrerede humane tilfælde af *Salmonella* fra hhv. fjærkræ, oksekød, svinekød og æg (dansk produceret eller importeret), 2005-2007 (i %)

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Samlede antal reg. tilfælde</td>
<td>1.775</td>
<td>1.658</td>
<td>1.647</td>
</tr>
<tr>
<td>Dansk produceret svinekød</td>
<td>12,1</td>
<td>6,1</td>
<td>6,5</td>
</tr>
<tr>
<td>Dansk produceret oksekød</td>
<td>1,5</td>
<td>1,4</td>
<td>0,8</td>
</tr>
<tr>
<td>Dansk produceret kylling</td>
<td>4,1</td>
<td>0,5</td>
<td>0,8</td>
</tr>
<tr>
<td>Dansk produceret and</td>
<td>0,7</td>
<td>0,7</td>
<td>-</td>
</tr>
<tr>
<td>Æg</td>
<td>12,1</td>
<td>6,2</td>
<td>11,0</td>
</tr>
<tr>
<td>Importeret svinekød</td>
<td>2,5</td>
<td>1,6</td>
<td>1,3</td>
</tr>
<tr>
<td>Importeret oksekød</td>
<td>3,7</td>
<td>1,3</td>
<td>1,2</td>
</tr>
<tr>
<td>Importeret kylling</td>
<td>10,9</td>
<td>9,2</td>
<td>3,7</td>
</tr>
<tr>
<td>Importeret kalkun</td>
<td>1,0</td>
<td>5,2</td>
<td>0,7</td>
</tr>
<tr>
<td>Importeret and</td>
<td>0,4</td>
<td>0,7</td>
<td>-</td>
</tr>
<tr>
<td>Rejser</td>
<td>24,0</td>
<td>24,7</td>
<td>46,3</td>
</tr>
<tr>
<td>Ukendt i alt (inkl. udbud med ukendt kilde)</td>
<td>27</td>
<td>42,3</td>
<td>27,8</td>
</tr>
</tbody>
</table>

Hovedgrupper (produkt) – i alt

<table>
<thead>
<tr>
<th></th>
<th>49</th>
<th>33</th>
<th>26</th>
</tr>
</thead>
<tbody>
<tr>
<td>Svinekød i alt</td>
<td>14,6</td>
<td>7,7</td>
<td>7,8</td>
</tr>
<tr>
<td>Oksekød i alt</td>
<td>5,2</td>
<td>2,7</td>
<td>2,0</td>
</tr>
<tr>
<td>Kylling i alt</td>
<td>15,0</td>
<td>9,7</td>
<td>4,5</td>
</tr>
<tr>
<td>Andet fjærkræ i alt</td>
<td>2,1</td>
<td>6,6</td>
<td>0,7</td>
</tr>
<tr>
<td>Æg</td>
<td>12,1</td>
<td>6,2</td>
<td>11,0</td>
</tr>
</tbody>
</table>

Hovedgruppe (land) – i alt

<table>
<thead>
<tr>
<th></th>
<th>49</th>
<th>33</th>
<th>26</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dansk kød</td>
<td>18,4</td>
<td>8,7</td>
<td>8,1</td>
</tr>
<tr>
<td>Importeret kød</td>
<td>18,5</td>
<td>18,0</td>
<td>6,9</td>
</tr>
<tr>
<td>Æg</td>
<td>12,1</td>
<td>6,2</td>
<td>11,0</td>
</tr>
</tbody>
</table>


Ses der udelukkende på danske produkter, er svinekød ansvarlig for flere salmonella-
tilfælde end kylling. I perioden 2005-2007 skete et markant fald i salmonellatilfælde
knyttet til både dansk svinekød og kylling, mens antallet af salmonellatilfælde fra æg
ikke faldt tilsvarende. Ses der udelukkende på importerede produkter, står kylling for
flere salmonellatilfælde end svinekød, selv om der også på importsidan er sket en
markant reduktion i antallet af salmonellatilfælde knyttet til kylling i perioden.

Ses der på produktvise forskelle i salmonellaforekomst uden hensyntagen til oprindel-
sesland, har svinekød og kylling i perioden 2005-2007 stort set været kilde til lige
mange sygdomstilfælde. Den største forskel er estimeret i 2007, hvor svinekød stod
for 7,8 % af salmonellatilfældene mod 4,5 % fra kylling. Og ses omvendt på oprindel-
sesland uden hensyntagen til produkt, er dansk og importeret kød i grove træk kilde til
lige mange sygdomstilfælde.

Æg, der ikke er indregnet som en del af kødforbruget, bidrog i 2007 til en ganske be-
tragtelig del af salmonellatilfældene, nemlig 11 %. Det kan umiddelbart synes overra-
skende, idet risikoen i danske æg anses for at være lille. Studier viser, at salmonella-
forekomsten typisk er større i udenlandske end i danske æglæggerflokke (se tabel 02,
tabelnote 3) men den nuværende import af æg vurderes som sådan ikke at udgøre en
stor risiko, da importerede æg i dag stort set kun anvendes i fødevareindustrien og
varmebehandles. Der er dog fundet eksempler på, at udenlandske skalæg optræder i
danske butikker og en stigende import vil sandsynligvis udgøre en risikofaktor. I
smittekilderegnskabet vil tilfælde fra importerede æg dels blive tilskrevet danske æg,
dels ukendt kilde, da oplysninger om salmonellaforekomst i de partier, der importeres,
ikke haves. Både forbrugernes håndtering af æg og en højere salmonellaforekomst i
importerede æg er formentlig væsentlige årsager til ægbårne infektioner med Salmo-
nella.

Med den grove pensel kan vi konkludere, at stort set lige mange tilfælde af salmonel-
lose i 2007 kunne henføres til henholdsvis æg, dansk kød og importeret kød.

Det bør nævnes, at der er nogle væsentlige usikkerhedspunkter i forhold til smitteki-
deregnskabet. Først og fremmest relateres en forholdsvis stor andel af salmonellatil-
fældene til smittekilden ukendt (27,8 %). Hvis eller når det bliver muligt at få denne
klump af salmonellatilfælde fordelt på smittekilder, samt hvis eller når registrerings-
raten kan bestemmes mere præcist, kan der naturligvis ske forskydninger i den pro-
duktvise fordeling. Det skal ligeledes nævnes, at bidraget fra de forskellige produkt-kategorier varierer betydeligt fra år til år.

0.2.2. Campylobacter


0.3. Zoonotiske risici i svinekød, kylling og æg


Som det fremgår af tabel 02, er der forskel på risici fra henholdsvis danskproduceret og importeret svine- og kyllingekød. Dansk svinekød har traditionelt haft en lavere Salmonellarisiko end udenlandsk svinekød – men i 2008 var risikoen i importeret svinekød for første gang på niveau med dansk svinekød. I 2008 påviste case-by-case kontrollen således Salmonella i lidt flere danske partier end importerede (11,9 % af de danske partier mod 10,4 % af de importerede partier (DVFA, 2009, s. 6). Danske kyllinger har en lavere forekomst af både Salmonella og Campylobacter end importerede kyllinger.
**Tabel 0.2. Oversigt over campylobacter- og salmonellaforekomst i svinekød, kylling og æg opdelt i dansk producerede og importerede produkter (så vidt muligt 2007-tal).**

Det er vigtigt at bemærke, at metoder for prøveudtagning og analyser varierer, hvilket betyder, at forekomsten i de forskellige produktkategorier ikke kan sammenlignes.

<table>
<thead>
<tr>
<th>Produkt</th>
<th>Forekomst i danke produkter (i procent)</th>
<th>Forekomst i import (i procent)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salmonella</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Svinekød (slagtekroppe, på slakteri)</td>
<td>1,1 %</td>
<td>13,1 %</td>
</tr>
<tr>
<td>Svinekød (partier, case-by case)</td>
<td>11,3 %</td>
<td></td>
</tr>
<tr>
<td>Kylling (flokke, på slakteri)</td>
<td>1,2 %</td>
<td></td>
</tr>
<tr>
<td>Kylling (partier, case-by-case)</td>
<td>1,6 %</td>
<td>14,5 %</td>
</tr>
<tr>
<td>Skalæg (æglæggerflokke, i besætning, dansk overvågning)</td>
<td>1 %</td>
<td></td>
</tr>
<tr>
<td>Skalæg (æglæggerflokke, i besætninger, EU baseline studie)</td>
<td>2,4 %</td>
<td>EU gns. 30,7 pct. (0-80 pct.)</td>
</tr>
<tr>
<td><strong>Campylobacter</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Svinekød (prøver af hakket kød)</td>
<td>0,2 %</td>
<td></td>
</tr>
<tr>
<td>Kylling (kødprøver, på slakteri)</td>
<td>8,2 %</td>
<td></td>
</tr>
<tr>
<td>Kylling (partier, case-by-case)</td>
<td>15,1 %</td>
<td>27,7 %</td>
</tr>
<tr>
<td>Skalæg</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>

**Kilder:**
1. **Salmonella i svinekød.** I 2007 lå forekomsten af *Salmonella* på slagtesvinene på 1,1 % (Anonymous, 2009, s. 10 og s. 41). Ifølge case-by-case kontrollen lå forekomsten på 13,1 % af partierne (DVFA, 2008, s. 5). Siden indførelse af case-by-case kontrollen i 2007 er forekomsten på niveau med det danske svinekød. Faktisk blev der i case-by-case kontrollen i 2008 påvist *Salmonella* i flere danske partier end importerede (DVFA, 2009, s. 6).
2. **Salmonella i kylling.** I case-by-case kontrollen, blev der påvist *Salmonella* i dansk fjerkrækød i 1,6 % partier i 2007 og i 0,3 % i 2008 (DVFA, 2009, s. 5). I 2007 lå forekomsten på 13,1 % af partierne (DVFA, 2008, s. 5 og Anonymous, 2009, s. 44). Siden indførelse af case-by-case kontrollen i 2007 er forekomsten på niveau med det danske svinekød. Faktisk blev der i case-by-case kontrollen i 2008 påvist *Salmonella* i flere danske partier end importerede (DVFA, 2009, s. 6).
3. **Salmonella i æg.** Forekomst i/på æg er meget lav. En undersøgelse fra 2001-2002 fandt at 0,05 % af de danske æg var inficeret med *Salmonella* på skallen og 0,02 % var inficeret med *Salmonella* indeni ægget (blommor eller hviden). I importerede æg (fra Holland, Tyskland og Sverige) fandt man *Salmonella* på skallen i 0,55 % af æggen og 0,25 % af de udenlandske æg var inficeret med *Salmonella* indeni ægget (blommor eller hviden). Danish Eggs (2005) s. 10. Forekomsten i 2007 lå under 1 % af danske æglæggerflokke (5 ud af 510 flokke, Anonymous, 2009, s. 37). I 2008 blev der fundet *Salmonella* i 14,5 % af de importerede partier fjerkrækød (Anonymous, 2009, s. 44 og DVFA 2008 s. 4) og i 15 % i 2008 (DVFA, 2009, s. 5).
4. **Campylobacter i svinekød.** Der er meget lille campylobacter-risiko forbundet med dansk svinekød (0,2 % i hakket svinekød i 2002, Anonymous (2003)). Vi har ikke været i stand til at finde oplysninger om *Campylobacter* risici fra importeret svinekød. Til gengæld er campylobacterforekomsten i svinebesætninger på 76,6 % for C. coli og 1,9 % for C. jejuni. Til sammenligning var *Campylobacter* forekomsten i kvægbesætninger på 3 % for C. coli og 67,4 % for C. jejuni (Anonymous 2009, s. 44).
6. **Campylobacter i skalæg.** Er ikke en del af overvågningen, da skalæg ikke anses for at være et risikoprodukt. Ingen undersøgelser tyder på forekomst af *Campylobacter* indeni æg.

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**14 FOI** Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with *Salmonella* and *Campylobacter*
Derfor er importandelen en vigtig faktor i forhold til at vurdere risikoniveauet i det kød, der købes i danske butikker. Det overordnede billede er, at langt den overvejende del af kødførbruget i Danmark er hjemmeproduceret. Det anslås at ca. 40 % af kyllingerne på det danske marked i dag er importeret (se kapitel 4 i rapporten). Angivelsen af importandel af det private forbrug er temmelig usikker, hovedsagelig fordi det ikke er præciseret, hvor stor en andel af importen der er svind (fedt, ben, hoved), og hvor meget der geneksporteres. Det har derfor ikke været muligt at få præcise data for andelen af importeret svinekød. Et rimeligt realistisk bud menes dog at være, at 20-25 % af svinekødet er importeret (se kapitel 3 i rapporten). For æg angives importandelen at være 25-30 % - hvoraf langt den overvejende del anvendes af industrien og derfor varmebehandlet (se kapitel 5 i rapporten). Dvs. langt hovedparten af danskernes forbrug af skalæg er af dansk oprindelse.

Forholdene mellem bakterieforekomst og human sygdomsforekomst afhænger også af hvor ofte og hvor meget, der spises af de forskellige produkttyper. Sidstnævnte ser vi mere på nedenfor.

0.4. Forbrug af kød og æg


Kødførbruget ifølge Danmarks Statistik lå næsten dobbelt så højt som ifølge kostundersøgelsernes data (97 kg ifølge Danmarks Statistik i 2006 mod 51 kg i kostundersøgelserne i 2000-2002). Til gengæld er fordelingerne mellem kødtyper ikke særlig forskellige. Danmarks Statistik fordeler danskernes kødførbrug på 46 % svinekød, 28 % oksekød, 25 % fjerkræ og knapt 2 % andet (lam, vildt og hestekød), mens kostunder-
søgelserne fordeler kødforbruget på 80 % svine og oksekød og 20 % fjerkræ, som vi efterfølgende har estimeret til at være fordelt på 50 % svinekød, 30 % oksekød og 16 % kylling og 4 % andet fjerkræ. Oplysningerne er gengivet i tabel 03.

Vi er hovedsagelig interesserede i fordelingen af forbrug mellem svinekød og kylling og den varierer ikke så meget mellem metoderne. I tabel 03 ses at danskerne gennemsnittligt spiser mellem 2,5 (Danmarks Statistik) og 3,3 (Lyhne et al., 2005) gange mere svinekød end kylling.

<table>
<thead>
<tr>
<th>Tabel 0.3. Fordeling af kødforbrug på typer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Produkttype</td>
</tr>
<tr>
<td>Forbrug Kg/år</td>
</tr>
<tr>
<td>Svine- og oksekød</td>
</tr>
<tr>
<td>- heraf svin</td>
</tr>
<tr>
<td>- heraf okse</td>
</tr>
<tr>
<td>Fjerkræ</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Kød i alt</td>
</tr>
<tr>
<td>Svinekød ift. kylling</td>
</tr>
<tr>
<td>Æg</td>
</tr>
</tbody>
</table>

Note:
1) I kostundersøgelserne opgøres svinekød og oksekød samlet (80 % af samlet kødforbrug). Fordeling ml. svinekød (63 %) og oksekød (27 %) er baseret på kilderne Danish Meat Association (2008), Andersen (2007) og Danish Agriculture (2006): I pågældende kilder ligger svinekødets andel af svine- og oksekød på mellem 62 % og 64 %. Vi anvender 63 %.
2) Beregnet ud fra Danish Poultry Council (2007) s. 118 og 122, hvor det angives at danskerne spiste 23,5 kg fjerkræ i 2006 heraf 18,8 kg kylling hvilket svarer til at kylling udgør 80 % af danskernes forbrug af fjerkræ.
3) I Lyhne et al. (2005) er forbrug angivet i gram/dag – disse er omregnet til kg/år. Begge kilder indeholder i principippet spisning uden for hjemmet.

Vi formoder forbrug af de forskellige kategorier af kød trods alt er ’husket’ mere nøjagtigt i kostundersøgelserne end de er estimeret i Danmarks Statistik, på grund af den manglende registrering af svind og genekspert i opgørelserne fra Danmarks Statistik.

5 I kostundersøgelserne registreres andet kød såsom lam, vildt og hestekød under kategorien svine- og oksekød. Forbruget heraf vurderes at være så lille at fordelingen mellem svinekød og kylling ikke forstyrres.

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Vi har derfor valgt at bruge oplysningerne fra kostundersøgelserne 2000-2002 til at opsummere følgende om danskernes forbrug af kød og æg:

Danskere spiser mindst 51 kg kød om året. Den gennemsnitlige dansker spiser ca. 26 kg svinekød, 8 kg kylling og 6 kg æg årligt. Kødforbruget er fordelt på ca. 50 % svinekød, 30 % oksekød og 16 % kylling og 4 % andet fjærkræ. Herudover spiser danskerne ca. 6 kg æg svarende til ca. 120 æg om året. Den typiske dansker spiser således godt 3 gange så meget svinekød som kyllingekød. Disse tal er naturligvis også behæftet med en vis usikkerhed – og der kan være store variationer på tværs af befolkningsgrupper - men det giver dog en klar indikation af at der generelt spises noget mere svinekød end kylling.

0.5. Kvalitetsegenskaber - risici og markedsandele

Vi har allerede set at Salmonella og Campylobacter risici afhænger af kødkategori og kødets oprindelsesland. Derudover afhænger risici ofte også af produktionsform og forarbejdningsgrad. I tabel 04 opsummeres dokumenteret viden om sammenhænge mellem zoonotiske risici, produktionssystemer, forarbejdningsgrad og oprindelsesland.
### Tabel 0.4. Oversigt over zoonotiske risici ved svinekød, kylling og æg kategoriseret i forhold til produktionssystem, forarbejdningsgrad og oprindelsesland

<table>
<thead>
<tr>
<th></th>
<th>Produktionssystem</th>
<th>Forarbejdningsgrad</th>
<th>Oprindelsesland</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salmonella</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Svin1)</td>
<td>Højere forekomst målt i konventionelle svinebesætninger end i både økologiske og ikke-økologiske frilandsbesætninger</td>
<td>Højere forekomst i hakket svinekød end i en stæng</td>
<td>Stort set samme forekomst målt i dansk og importeret svinekød</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Højere forekomst i svinnekød fra forpart end bagpart</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Frysning har kun marginal effekt på <em>Salmonella</em> i svinekød</td>
<td></td>
</tr>
<tr>
<td><strong>Kylling2)</strong></td>
<td>Ingen data</td>
<td>Frysning reducerer <em>Salmonella</em> niveau i kylling med en faktor 5 (reduktion på 0,7 log)</td>
<td>Højere forekomst i importeret kylling</td>
</tr>
<tr>
<td><strong>Æg3)</strong></td>
<td>Ingen signifikante forskelle</td>
<td>Pasteurisering reducerer markant forekomst og antal <em>Salmonella</em> bakte rier i æggeprodukter</td>
<td>Højere forekomst i æg læggere i andre Europæiske lande</td>
</tr>
<tr>
<td><strong>Campylobacter</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Svin4)</td>
<td>Lav campylobacterforekomst i dansk svinekød i detailhandel. Ingen data på produktionssystem og importeret svinekød.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kylling5)</td>
<td>Højere forekomst i økologisk kylling</td>
<td>Højere forekomst i køl end frost - seneste data viser dog meget lille forskel. Til gengæld er antallet af <em>Campylobacter</em> lavere i det froscne kød</td>
<td>Højere forekomst i importeret kylling</td>
</tr>
<tr>
<td><strong>Æg</strong></td>
<td>Ingen kendt <em>Campylobacter</em> risiko forbundet med æg</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Resistente bakterier

|                  | Svinekød, kylling og æg5) | Lavere forekomst af resistente bakterier i økologisk svineproduktion | Flere resistente *Salmonella* bakterier i importeret svinekød og kylling |

### Noter:

1. **SALMONELLA I SVINEKØD. Produktionssystem:** Zheng et al. (2007) og Wingstrand et al. (2009) viser begge en tendens til at Salmonellaforekomsten er højere i konventionelle besætninger end i alternative besætninger. **Forarbejdning:** Kød fra forparten kontamineres lettere end kød fra bagparten under udtagning af organer. Kød fra forparten er sæjere og anvendes oftere til forarbejdede produkter end bagendens kød. **Import:** Se tabel 02.

2. **SALMONELLA I KYLLING. Produktionssystem:** Ikke tilstrækkeligt med data til at kunne sammenligne på tværs af produktionssystemer. **Forarbejdning:** Notermans et al. (1975). **Import:** Se tabel 02.

3. **SALMONELLA I ÆG. Produktionssystem:** Anonymous (2006). **Import:** Se tabel 02.

4. **CAMPYLOBACTER I SVINEKØD. Forekomsten i dansk hakket svinekød i detailhandel var 0,2 % i 2002 (Anonymous, 2003, s. 19).**

5. **CAMPYLOBACTER I KYLLING. Produktionssystem:** Data fra 1998-2000 indikerer, at der er Campylobacter i alle økologiske kyllingeflokke og i 37 % af konventionelle kyllingeflokke, Heuer et al. (2001). I 2006 var Campylobacter forekomst i konventionelle kyllingeflokke reduceret til 30 % (Anonymous, 2007, s. 24). **Forarbejdning:** 31 % i kølet dansk kylling mod 19 % i frossen dansk kylling. Og 51 % i importeret kølet kylling mod 34 % i importeret frossen kylling, Anonymous (2009) s. 39. **Import:** Se tabel 02.

Betydningen for folkesundheden af sammenhængene mellem risiko og kvalitet afhænger i høj grad af, hvor meget forbrugerne køber og efterfølgende indtager af forskellige kokedrager. Med hensyn til produktionsform, så er markedsandelene for økologisk kyllinge- og svinekød meget små (ca. 1 % i 2004), mens markedsandelen for økologiske æg lå i størrelsesorden 15 % i 2004. For alle produktgrupper er der en tendens til stigende økologiske markedsandele. I forhold til bekæmpelse af salmonellarisici, ser denne trend ud til at være positiv, idet der tenderer til at være en højere salmonellaforekomst i konventionelle svinebesætninger, der har ikke kunnet måles signifikante forskelle mellem salmonellaforekomster i æg fra forskellige produktions-systemer (og prævalensen i ægglæggerflokke er i øvrigt generelt meget lav), og der er ikke tilstrækkeligt med data til at kunne dokumentere om der er forskelle i salmonellaforekomster i slagtekyllinger fra henholdsvis alternativ og konventionel produktion (men også her forekomsten i den konventionelle produktion lav). I forhold til bekæmpelse af campylobacterisici, anses et øget salg af økologiske kyllinger for at være en negativ udvikling, mens der for svinekød og æg ikke er kendte forskelle i campylobacterrisikoen fra forskellige produktionsformer – generelt vurderes campylobacterrisikoen som forsvindende lille i svinekød og æg.


Da der er zoonotiske risici forbundet med at indtage kød, vil det, alt andet lige, reducere risikoen for en zoonotisk infektion at spise mindre kød. Der har været et aftagende forbrug af svinekød, hvilket isoleret set mindsker risici for infektioner med Salmonel-

6 I selve rapporten beskrives sammenhængene i større detaljer ligesom kilderne angives.

Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter
nella. Alligevel udgør svinékød stadig ca. 50 % af danskernes kødforbrug. Det mest solgte svinékødsprodukt er hakket svinékød som i perioden 1997-2004 udgjorde ca. 25 % af svinékødsalget. Endvidere har der været en øget import af kylling, hvilket isoleret set øger risici for infektioner med både Salmonella og Campylobacter. For at kunne vurdere fødevaresikkerhedsaspekterne af ovennævnte tendenser, skal der ses nøje på eventuelle sammenhænge i danskernes sammensætning af kødforbruget (såsom om nedgangen i danskernes forbrug af svinékød er et udtryk for at de spiser mindre kød eller om de ’bare’ skifter svinékød ud med kylling).

0.6. Konklusion og perspektiver


Forbruget af svinékød er faldet det seneste årti, hvorimod forbrug af æg og især kylling er steget. Alligevel spiser danskerne stadig ca. tre gange så meget svinékød som kylling.

Som nævnt udgør ukendt smittekilde godt en fjerdedel af de registrerede salmonella-tilfælde i 2007.mere detaljeret viden om smittekilderne kan naturligvis forrykke de præsenterede fordelinger af risici. For Campylobacter er det endnu ikke muligt at etablere et smittekilderegnskab. Fremtidige indsatser for at forbedre smittekilderegnskaberne er derfor et felt, hvor yderligere forskning vil kunne forbedre beslutningsgrundlaget i fødevaresikkerhedspolitikken betydeligt. Her bør også nævnes tydelige gevinstor politikudformningen ved en indsats for at øge præcisionen af registreringsraten (som pt. typisk angives at ligge mellem 5 % og 20 %).

Nærværende beskrivelse af zoonotiske risici har fokuseret på forekomster, dvs. om bakterierne er til stede eller ej. Antallet af Campylobacter og Salmonella i kødet også uhyre vigtigt for risikoen for at blive syg. En systematisk offentliggørelse af omfanget af bakterier i produkterne (i samme stil som smittekilderegnskabet for Salmonella), ville derfor kunne kaste lys på sammenhængen mellem produktrisici og humane risici.

Der er en stadig voksende udveksling af fødevarer på tværs af landegrænser. På den ene side har der været en stigende import af svinékød og især kylling, hvilket betyder
at en politik der har til hensigt at forbedre fødevaresikkerheden i Danmark nødvendigvis må forholde sig til at importeret kød ofte indeholder flere og mere resistente bakterier. På den anden side eksporterer Danmark flere kyllinger og svin end der importeres. Det medfører at danske sikkerhedskrav også kommer udenlandske forbrugere til gode. Samlet set betyder den stigende samhandel med udlanget, at fødevaresikkerhed er et problem på tværs af grænser, og at det må inddrages som en præmis i fremtidig fødevarepolitik. Danmarks forventede opnåelse af EU-særstatus på Salmo-
ella i æg i 2009 efter dokumenteret lav forekomst og en stærk overvågning af produktionen er et meget aktuelt eksempel på hvordan de internationale institutioner kan bruges til at forbedre fødevaresikkerheden i Danmark7. Herudover er der på Europæ-
isk niveau bl.a. restriktioner mod handel med æg fra flokke der er positive for Salmo-
ella typhimurium og Salmonella enteritidis – disse æg må ikke sælges til konsum8.

Samlet set signalerer disse tendenser, at det nok må anbefales at tage en flerstrenget strategi i brug til forbedring af fødevaresikkerheden i Danmark: Gør det mere attrak-
tivt at købe varer med reduceret zoonotiske risici (dvs. stimuler efterspørgslen), og forbrugernes interesse, viden og adfærd om håndtering af kød- og ægprodukter hjemme i køkkenet (dvs. uddan forbrugerne), og viden om zoonotiske risici (dvs. sti-
muler forskningen), påvirk produktionen af sikre fødevarer (dvs. stimuler udbud) og samarbejd globalt om zoonosebekæmpelsen (stimuler det internationale politiske mil-
jo).


Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter  FOI  21
Consumption patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter
Summary

Consumption patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs, and the consumer risk associated with Salmonella and Campylobacter

Resumé
Over recent years Campylobacter bacteria have caused twice as many cases of human infection as Salmonella, but at the same time salmonellosis has caused twice as many premature deaths as campylobacteriosis. Salmonella infections are typically associated with meat and eggs, while Campylobacter infections are mainly linked to poultry meat. Historically, Salmonella prevalence in pork has been higher in imported than domestic pork, but case-by-case control in 2008 showed almost the same prevalence in Danish pork. Danish chicken meat has a lower prevalence of Salmonella and Campylobacter than imported chicken. The situation in 2005–2007 seems to be that chicken pose the largest bacterial problem, especially with respect to Campylobacter, even though Danes’ consumption of pork is around three times higher than their consumption of chicken meat. The Salmonella risks associated with Danish chicken are small, but Salmonella risks associated with imported chicken are rather high. In addition, a large proportion of chicken has large numbers of Campylobacter. None, or hardly any, Campylobacter risks are thought to be associated with pork and eggs. The trends towards greater consumption, and more imports, of poultry are hampering efforts to reduce the zoonotic risks associated with food consumption in Denmark.

0.1. Introduction
Every year several thousand Danes are infected by the food-borne bacterial pathogens Salmonella or Campylobacter bacteria. The detrimental impact of this, both on individuals and on society as a whole, is considerable. Salmonella infections are typically associated with meat and eggs, while Campylobacter infections are mainly linked to poultry meat. Since 1989, Denmark has implemented national action plans for the control of Salmonella in poultry, pork, eggs and beef. National surveillance schemes concerning Campylobacter, resistant bacteria, and medical residues in food have also been in place since mid-1990s (www.food.dtu.dk). The first official action plan on Campylobacter was formulated in 2008. These initiatives have reduced, but not eliminated, the risks. As a consequence, the Danish Ministry of Food, Agriculture and

9 The Campylobacter action plan is described in DVFA (2008).
Fisheries financed three research projects in 2005 deploying microbiological, socio-
logical as well as economic evaluation criteria with the overall aim of reducing
zoonotic risks in chicken meat and pork.\footnote{In 2005, the Danish Ministry of Food, Agriculture and Fisheries financed the research programme “The Food Sector of the Future” (Fremtidens Fødevaresektor). The present report is part of the projects (CAMPY, DECONT and QUALYSAFE). For further information, see \url{http://ferv.fvm.dk/Projekter.aspx?ID=33727}}

The purpose of the present report is to describe the relationship between zoonotic
risks and trends in the consumption of meat and eggs. To pursue this goal we need,
essentially, to answer two questions: 1) What are the risks associated with different
types of meat product? 2) In what quantities are the various types of meat product
consumed? We use publicly available market data and statistics on consumption pat-
terns to provide an overview of market shares and trends in the markets for various
animal products.

We need some inputs to assess the risks associated with consuming chicken meat,
pork and eggs. First of all, we need to quantify the size of the problem in terms of the
number of human infections caused by \textit{Salmonella} and \textit{Campylobacter}.\footnote{In the present report, the number of human cases of illness is used as an indicator of the social
costs generated by \textit{Salmonella} and \textit{Campylobacter.}} Using the
\textit{Salmonella} source account system, we divide the cases of salmonellosis as far as pos-
sible into human infections associated with the consumption of pork, chicken meat
and eggs; and into human infections associated with domestic and imported produce.
A similar source account system is not yet available for \textit{Campylobacter}. Secondly, it
is necessary to obtain information concerning differences in the zoonotic risks pre-
sented by pork, chicken meat and eggs. In addition, we try to provide an overview of
differences in the risks posed by domestic and imported produce, and between differ-
ent production systems (e.g. organic vs. conventional) and different processing char-
acteristics (e.g. chilled vs. frozen). Last, but not least, we make use of information on
Danes’ consumption of different types of meat.

Using these inputs, we try to assess the relative importance of the various kinds of
zoonotic hazard, and we ask whether trends in consumption patterns put increasing or
decreasing pressure on food safety. Thus the report aims to provide information about
consumer preferences for various product qualities as well as highlighting the relative
importance of various zoonotic hazards in a public health context.

\footnotesize{\textsuperscript{10} In 2005, the Danish Ministry of Food, Agriculture and Fisheries financed the research programme “The Food Sector of the Future” (Fremtidens Fødevaresektor). The present report is part of the projects (CAMPY, DECONT and QUALYSAFE). For further information, see \url{http://ferv.fvm.dk/Projekter.aspx?ID=33727}}

\footnotesize{\textsuperscript{11} In the present report, the number of human cases of illness is used as an indicator of the social
costs generated by \textit{Salmonella} and \textit{Campylobacter.}}
Our report focuses on *Salmonella* and *Campylobacter* in pork, chicken meat and eggs. Other types of meat such as beef, turkey, and duck are included in the analysis only when that is found to be necessary in understanding the overall picture. The report is organized as follows: following the introduction (Chapter 1), we provide a general description of production, consumption, and foreign trade in general categories of food and beverage. Detailed analyses are then provided of the markets for pork products (Chapter 3), chicken meat (Chapter 4) and eggs (Chapter 5). Conclusions and perspectives are presented in Chapter 6. Data documentation appears in the appendices.

### 0.2. Human cases

In 2007, 1647 cases of salmonellosis and 3868 cases of campylobacteriosis were reported in Denmark. Similar annual figures have been reported over recent years. (It should be noted that the series of large-scale outbreaks of Salmonellosis in 2008 are thought to have been atypical.) It is estimated that around 0.5% of registered campylobacteriosis patients (Korsgaard, 2007) and 2% of registered salmonellosis patients will die prematurely as a result of their infection (Helms & Korsgaard, 2008). Hence, it is estimated that in 2007, 19 and 33 persons died prematurely from campylobacteriosis and salmonellosis, respectively. As only a fraction of infected persons seek medical help, the real number of cases is generally believed to be 5 to 20 times higher than that reported (Korsgaard et al., 2005). It seems reasonable to assume that the same proportions of actual cases of illnesses are registered for *Salmonella* and *Campylobacter*. If this is right, *Campylobacter* bacteria have caused twice as many cases of human infection as *Salmonella* over recent years, but at the same time salmonellosis causes twice as many premature deaths as campylobacteriosis. Figure 1 illustrates the development in registered human cases of salmonellosis and campylobacteriosis.
Figure 0.1. Numbers of reported cases of salmonellosis and campylobacteriosis 1980–2008

There has been a significant reduction in the number of cases of salmonellosis, from more than 5000 in 1997 to around 1600 in recent years. The salmonellosis cases attributed to chicken peaked in 1988; those attributed to pork peaked in 1994, and those attributed to eggs peaked in 1997. Campylobacteriosis peaked in 2001, reaching 4620 human cases (Anonymous, 2009, p. 6).

0.2.1. Salmonella

The Danish Zoonosis Centre, Technical University of Denmark, has developed a mathematical model to estimate the contribution of major animal food sources to human *Salmonella* infections (Hald et al., 2004). Findings based on the model are published in annual reports on zoonoses (Anonymous, 2009). Table 05 presents the number of reported human cases of salmonellosis in Denmark in the period 2005–2007. The figures are categorized according to source, i.e. according to type of product and whether it was domestically produced or imported (Anonymous, 2009).
Table 0.5. Number of reported human cases of salmonellosis attributed to pork, beef, chicken, duck, turkey, and table eggs for Danish and imported products (in %)

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of reported human cases</td>
<td>1,775</td>
<td>1,658</td>
<td>1,647</td>
</tr>
<tr>
<td>Domestically produced pork</td>
<td>12.1</td>
<td>6.1</td>
<td>6.5</td>
</tr>
<tr>
<td>Domestically produced beef</td>
<td>1.5</td>
<td>1.4</td>
<td>0.8</td>
</tr>
<tr>
<td>Domestically produced chicken</td>
<td>4.1</td>
<td>0.5</td>
<td>0.8</td>
</tr>
<tr>
<td>Domestically produced ducks</td>
<td>0.7</td>
<td>0.7</td>
<td>-</td>
</tr>
<tr>
<td>Table eggs</td>
<td>12.1</td>
<td>6.2</td>
<td>11.0</td>
</tr>
<tr>
<td>Imported pork</td>
<td>2.5</td>
<td>1.6</td>
<td>1.3</td>
</tr>
<tr>
<td>Imported beef</td>
<td>3.7</td>
<td>1.3</td>
<td>1.2</td>
</tr>
<tr>
<td>Imported chicken</td>
<td>10.9</td>
<td>9.2</td>
<td>3.7</td>
</tr>
<tr>
<td>Imported turkey</td>
<td>1.0</td>
<td>5.2</td>
<td>0.7</td>
</tr>
<tr>
<td>Imported duck</td>
<td>0.4</td>
<td>0.7</td>
<td>-</td>
</tr>
<tr>
<td>Travels(^1)</td>
<td>24.0</td>
<td>24.7</td>
<td>46.3(^1)</td>
</tr>
<tr>
<td>Unknown source, including outbreaks of unknown source(^1)</td>
<td>27</td>
<td>42.3</td>
<td>27.8</td>
</tr>
</tbody>
</table>

Main categories (product) – total

<table>
<thead>
<tr>
<th></th>
<th>49</th>
<th>33</th>
<th>26</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pork total</td>
<td>14.6</td>
<td>7.7</td>
<td>7.8</td>
</tr>
<tr>
<td>Beef total</td>
<td>5.2</td>
<td>2.7</td>
<td>2.0</td>
</tr>
<tr>
<td>Chicken total</td>
<td>15.0</td>
<td>9.7</td>
<td>4.5</td>
</tr>
<tr>
<td>Other poultry total</td>
<td>2.1</td>
<td>6.6</td>
<td>0.7</td>
</tr>
<tr>
<td>Table eggs</td>
<td>12.1</td>
<td>6.2</td>
<td>11.0</td>
</tr>
</tbody>
</table>

Main categories (origin) – total

<table>
<thead>
<tr>
<th></th>
<th>49</th>
<th>33</th>
<th>26</th>
</tr>
</thead>
<tbody>
<tr>
<td>Danish meat</td>
<td>18.4</td>
<td>8.7</td>
<td>8.1</td>
</tr>
<tr>
<td>Table eggs</td>
<td>18.5</td>
<td>18.0</td>
<td>6.9</td>
</tr>
<tr>
<td>Imported meat(^1)</td>
<td>12.1</td>
<td>6.2</td>
<td>11.0</td>
</tr>
</tbody>
</table>

\(^1\) Registration of travel history was significantly improved in 2007, leading to an increase in travel-related cases and fewer cases being either attributed to imported meat or of unknown source.


Excluding the large outbreaks in 2008, the numbers of human cases have been rather stable over the last couple of years, but the contributions of different sources have changed. In 2007, an improved method for estimating the number of travel-related cases of salmonellosis resulted in a significant increase in that number (from around 24% of the registered cases in 2005 and 2006 to 46% in 2007). This increase occurred at the expense of the categories imported meat (which fell from around 18% of the registered cases in 2005 and 2006 to less than 7% in 2007) and unknown (with 27% of registered cases being categorized as such in 2005, 42.3% in 2006 and 27.8% in 2007).
Within the category of Danish meat and eggs, pork is responsible for more cases of salmonellosis than chicken is. During the period 2005–2007, there was a significant reduction in the cases of salmonellosis from pork and chicken, while no clear trend was observed for salmonellosis from eggs. Within the category of imports, imported chicken accounts for more cases of salmonellosis than imported pork despite a significant reduction in the number of cases of salmonellosis from imported chicken meat between 2006 and 2007.

A comparison of meats, without distinguishing between domestic and imported meats, shows that the numbers of cases of salmonellosis from pork and chicken meat were quite similar in 2005–2007. The largest difference is estimated in 2007, where 7.8% of the cases of salmonellosis are attributed to pork as against the 4.5% attributed to chicken meat. Moreover, when domestic and imported meats are compared without distinguishing between different types of meat, the number of cases of salmonellosis from Danish meat is quite similar to that from imported meat.

Eggs contributed 11% of the cases of salmonellosis in 2007, which is a considerable share. That might at a first sight seem surprising, because the risk carried by any individual egg is thought to be small. Studies show that the prevalence of Salmonella is typically higher in layer flocks in other countries (see Table 06, note 3). The importation of eggs is not believed to introduce high levels of risk, because imported eggs are mainly used by the industry and are therefore subjected to heat treatments. However, imported table eggs have been found in Danish shops, and it is likely that increased imports could constitute a risk factor. In the Salmonella source account, human cases of salmonellosis from imported eggs would be registered as cases associated with Danish table eggs or an unknown source, as there is presently no account of Salmonella prevalence in imported table eggs. Consumer handling and higher Salmonella prevalence in imports might be important risk factors in relation to salmonellosis from eggs.

Approximating somewhat, we conclude that similar numbers of human infections of salmonellosis can be attributed to egg, Danish meat and imported meat in 2007.

It is worth noticing that our calculation of the relative importance of different places of origin and different types of meat and egg is based on 72.2% of the registered cases. Hence, identifying the source of the remaining 27.8% of the registered cases and/or increasing the rate of registration could change this picture. In addition, it
should be noticed that the relative contributions to salmonellosis from pork, chicken meat and eggs change considerably from year to year.

0.2.2. Campylobacter

During the period 1999–2007, *Campylobacter* was the leading source of bacterial human diarrhoea. The numbers of registered cases of campylobacteriosis in recent years have been 3671, 3242 and 3868 in 2005, 2006 and 2007, respectively. For *Campylobacter*, a similar source account system with detailed information about sources of infections is not available yet. However, it is estimated that approximately one in three cases of campylobacteriosis is travel-related SSI (2009) and that the majority of cases are related to poultry (Anonymous, 2006, p. 23). More precisely, chilled chicken meat has been identified as the main food source of campylobacteriosis in Denmark (Wingstrand et al., 2006).

0.3. Zoonotic risks in pork, chicken meat and eggs

Surveillance data from the Danish Veterinary and Food Administration on the prevalence of *Salmonella* and *Campylobacter* in different types of meat and in eggs are published each year by the Zoonosis Centre at The Danish Technical University (Anonymous, 2009). Since 2007, the Danish Veterinary and Food Administration has tested samples of Danish and imported food, thus imposing what is often referred to as case-by-case control. An important element in the control is to try to induce Danish firms to require firms from which they receive food to meet a certain safety standard (DVFA, 2009, p. 3). Pork and beef are tested for *Salmonella*, and poultry is tested for *Salmonella* as well as *Campylobacter* (DVFA, 2009, p. 3). Based on this information, the prevalence of *Campylobacter* and *Salmonella* in pork, chicken meat and eggs (domestic or imported) is summarized in Table 06.
Table 0.6. Overview of *Salmonella* and *Campylobacter* prevalence in pork, chicken meat and eggs, categorized according to domestic vs. imported produce (the year is 2007 if no other year is specified). Due to differences in sampling methods, the prevalence in different product categories cannot be directly compared.

<table>
<thead>
<tr>
<th></th>
<th>Prevalence: Danish (%)</th>
<th>Prevalence: imports (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Salmonella</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pork (carcass, slaughter)(^1)</td>
<td>1.1 %</td>
<td></td>
</tr>
<tr>
<td>Pork (batch, case-by-case)(^1)</td>
<td>11.3 %</td>
<td>13.1 %</td>
</tr>
<tr>
<td>Chicken (flock, slaughter)(^2)</td>
<td>1.2 %</td>
<td></td>
</tr>
<tr>
<td>Chicken (batch, case-by-case)(^2)</td>
<td>1.6 %</td>
<td>14.5 %</td>
</tr>
<tr>
<td>Table eggs (layer flocks, Danish surveillance)(^3)</td>
<td>1 %</td>
<td></td>
</tr>
<tr>
<td>Table eggs (layer flocks, EU baseline study)(^4)</td>
<td>2.4 %</td>
<td>EU gns. 30.7 pct. (0-80 pct.)</td>
</tr>
<tr>
<td><em>Campylobacter</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pork (samples of minced meat)(^5)</td>
<td>0.2 %</td>
<td></td>
</tr>
<tr>
<td>Chicken (meat samples, slaughter)(^5)</td>
<td>8.2 %</td>
<td></td>
</tr>
<tr>
<td>Chicken (batches, case-by-case)(^5)</td>
<td>15.1 %</td>
<td>27.7 %</td>
</tr>
<tr>
<td>Table eggs(^6)</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

**Kilder:**
1. **SALMONELLA IN PORK. Danish:** Prevalence on carcasses (at slaughter) was 1.1% (Anonymous, 2009, p. 10 and p. 41). According to the case-by-case control, *Salmonella* prevalence in batches of Danish pork at retail was 11.3% (DVFA, 2008, p. 5). **Imported:** The introduction of case-by-case control suggested that the prevalence in imported pork is at the same level as Danish pork. In case-by-case control in 2007, 13.1% of the imported batches of pork were infected (DVFA, 2008, p. 5). In case-by-case control in 2008, *Salmonella* prevalence in Danish batches exceeded that in imports for the first time: the prevalence figures were 11.9% of the Danish batches against 10.4% of the imported batches (DVFA, 2009, p. 6).
2. **SALMONELLA IN CHICKEN. Danish:** In the case-by-case control, *Salmonella* in Danish chicken was found in 1.6% of the batches in 2007 (DVFA 2008, p. 3), and in 0.3% of the batches in 2008 (DVFA, 2009, p. 5). In 2007, the *Salmonella* prevalence in Danish broiler flocks was 1.6% (not shown in the table, but calculations based on *Salmonella* in 55 out of 3486 flocks, Anonymous, 2009 p. 38). At slaughter, the prevalence in broiler meat in 2007 was 1.2% (calculations based on 10 out of 828 flocks being infected, Anonymous (2009) p. 38). **Imported:** According to case-by-case control, *Salmonella* prevalence in imported chicken meat was 14.5% in 2007 (Anonymous, 2009, p. 44 and DVFA, 2008, p. 4) and 15% in 2008 (DVFA, 2009, p. 5).
3. **SALMONELLA IN EGGS. Danish:** A very low prevalence is found in eggs. A survey from 2001-2002 found that 0.05% of Danish eggs had *Salmonella* on the shell and 0.02% had *Salmonella* inside the eggs. (Danish Eggs. 2005. p. 10). The prevalence was below 1% in egg-laying flocks (calculations based on 5 out of 510 flocks being infected (Anonymous, 2009, p. 37). According to an EU baseline study in 2004-2005, the prevalence in Danish layer flocks was 2.4% (DVFA, 2006, p. 119). **Imported:** Danish Eggs (2005) p. 10: in imported eggs (from Holland, Germany and Sweden), *Salmonella* was found in 0.55% of the egg shells and inside 0.25% of the eggs. DVFA (2006) p. 119: Considerable variation across countries invalidates the use of common average (the average *Salmonella* prevalence of 30.7% in European egg-laying flocks covers prevalence from 0 (Sweden), through 2.4% (Denmark), to nearly 80% (Portugal).
4. **CAMPYLOBACTER IN PORK. Danish:** The prevalence of *Campylobacter* in Danish pork is very low (0.2% in minced pork according to surveillance in 2002 (Anonymous, 2003). At the same time, the prevalence in pig herds is rather high: in 2007, the prevalences of *C. coli* and *C. jejuni* were 76.6% and 1.9%, respectively (Anonymous 2009, p. 44).
5. **CAMPYLOBACTER IN CHICKEN. Danish:** Case-by-case control found *Campylobacter* in 15.1% of batches of Danish poultry in 2007 (DVFA, 2008, p. 3) and in 13% of batches in 2008 (DVFA, 2009, p. 5). According to Anonymous (2009) p. 37, the prevalence in chilled chicken meat at slaughter was 8.2% in 2007. **Imported:** According to case-by-case control, the prevalence in imported chicken was 27.7% in 2007 (DVFA, 2008, p. 4) and 20.2% in 2008 (DVFA, 2009).
6. **CAMPYLOBACTER IN EGGS.** Is not part of the surveillance as the table egg is not considered a risk-product. No known *Campylobacter* risk associated with consumption of eggs.
Table 06 reveals significant differences between Danish and imported pork and chicken meat. Historically, Danish pork has had a lower prevalence of Salmonella than imported pork, but in 2008, the risk in imported pork was the same level as that in Danish pork: in 2008, the case-by-case control reported *Salmonella* in 11.9% of Danish batches as compared with 10.4% of the imported batches (DVFA, 2009, p. 6). The prevalences of *Salmonella* and *Campylobacter* were found to be lower in Danish chicken meat than they were in imported chicken meat (DFVA, 2008).

Information on import share is important in the assessment of risk levels. An estimated 40% of chicken meat is imported (see Chapter 4 of the report). There is considerable uncertainty about the estimated import share, as the shares of fat, bones and head are not specified. A realistic ‘guessimate’ of the import share of pork is 20–25% (see Chapter 3 of the report). The importation of table eggs constitutes 25–30% of total consumption of table eggs, but it is hardly expected to be a significant cause of human salmonellosis, since the imports are mainly for industrial purposes. Hence, most meat consumed in Denmark is of Danish origin.

The relationship between product-risk and human illness also depends on how much, and how often, the various products are eaten. We pursue the latter in the following section.

### 0.4. Consumption of meat and egg

In the present section, private consumption of meat and eggs is described using two rather different methods. A study by Lyhne et al. (2005) is based on a survey of self-reported consumption from 2000–2002. They estimate total meat consumption of 51 kg/year for an adult person incorporating 41 kg of pork and beef and 10 kg of poultry. The other method is to use Statistics Denmark to estimate the meat and eggs available for consumption in 2006 (see Andersen, 2007). They estimate total meat consumption of 97 kg/year (incorporating 46% pork, 28% beef, 25% poultry and 2% other). Andersen (2007) has tried to compare the two methods. The consumed quantities differ by a factor of almost 2. One reason for this is, of course, that the data were collected in different years. However, it might be more important that the estimates from Statistics Denmark do not properly account for imports, exports, re-exports, and the extent to which offal is included; since Denmark is a net-exporter of chicken meat as well as pork, the number is likely to be too high (Andersen, 2007). On the other hand, meat...
consumption in Lyhne et al. (2005) is likely to have been underestimated as a result of strategic answering, as official advice on healthy diets includes ‘less meat’ as one of the main recommendations. The information is presented in Table 07.

<table>
<thead>
<tr>
<th>Table 0.7. Consumption of meat and eggs in Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year of consumption</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>Pork and beef 1)</td>
</tr>
<tr>
<td>- of which pork</td>
</tr>
<tr>
<td>- of which beef</td>
</tr>
<tr>
<td>Poultry</td>
</tr>
<tr>
<td>- of which chicken 2)</td>
</tr>
<tr>
<td>Others</td>
</tr>
<tr>
<td>Meat total</td>
</tr>
<tr>
<td>Pork relative to chicken</td>
</tr>
<tr>
<td>Egg 3)</td>
</tr>
</tbody>
</table>

Notes:
1) In the survey, an aggregate measure of pork and beef consumption is reported (80% of total meat consumption). The division of that aggregate measure into pork (63%) and beef (27%) is based on Danish Meat Association (2008), Andersen (2007) and Danish Agriculture (2006): these sources estimate the share of pork relative to pork and beef to be between 62% and 64%; we use 63%.
2) According to data from Danish Poultry Council 14 (2007, p. 122), the consumption of chicken meat in Denmark in 2006 was 18.8 kg, and the consumption of poultry was 23.5 kg (p. 118); hence chicken meat accounts for 80% of poultry consumption.
3) Danes' consumption of 17 kg according to Statistics Denmark is presented in Danish Agriculture (2007)
4) In Lyhne et al. (2005) consumption is measured in gram/days, which ratios are re-calculated to kg/year. Both sources include dining at home as well as at restaurants, at work, etc.

We are mainly interested in the relative importance of pork and chicken, and this does not differ greatly between the two methods. Table 07 reveals that, on average, Danes eat between 2.5 (Statistics Denmark) and 3.3 (Lyhne et al. 2005) times more pork than chicken.

We presume that the consumption of meat is ‘remembered’ more accurately than it is estimated in Statistics Denmark. Hence, we use the quantities and distributions found

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13 The eight official pieces of advice for a healthy diet are described in Astrup et al. (2005).
14 ‘Det danske fjærkrærad’.
in Lyhne et al. (2005) to draw the conclusions set out in the paragraph below about Danes’ consumption of meat and eggs.

The 2000–2002 data appear to indicate that the average adult Dane eats at least 51 kg of meat per year. An average adult Dane eats 26 kg of pork, 8 kg of chicken meat and 6 kg of eggs. Hence, around three times more pork than chicken is consumed. Meat consumption can roughly be divided into 50% pork, 30% beef, and 20% poultry (16% chicken and 4% other types of poultry). In addition, each adult Dane consumes around 6 kg of eggs each year (corresponding to around 120 eggs). Of course, these numbers are at best estimates, and there might be considerable variations across demographic groups; but they do indicate that much more pork than chicken meat is eaten.

0.5. Quality characteristics – risks and market shares

We have seen that Salmonella and Campylobacter risks depend on the type of meat and country of origin. In addition, risks will often be affected by type of production and processing characteristics. Table 08 summarizes the documented knowledge concerning relations between zoonotic risks, production system, processing characteristics and country of origin.
<table>
<thead>
<tr>
<th>Production system</th>
<th>Processing</th>
<th>Imports</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salmonella</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pork&lt;sup&gt;1)&lt;/sup&gt;</td>
<td>Higher prev. in pigs in conventional production</td>
<td>Case-by-case (batch): 13.1%</td>
</tr>
<tr>
<td></td>
<td>Higher prev. in minced pork than in roast</td>
<td>Historically higher prev. in imported pork – but not so in 2008</td>
</tr>
<tr>
<td></td>
<td>Higher prev. in pork from the front than rear of carcass</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Freezing has only a marginal effect on Salmonella in pork</td>
<td></td>
</tr>
<tr>
<td>Chicken&lt;sup&gt;2)&lt;/sup&gt;</td>
<td>No data</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Freezing reduces Salmonella risk in chicken</td>
<td>Case-by-case (batch): 14.5%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Higher prev. in imported chicken</td>
</tr>
<tr>
<td>Egg&lt;sup&gt;3)&lt;/sup&gt;</td>
<td>No significant differences</td>
<td>Pasteurization of eggs significantly reduces prev. and number of Salmonella counts&lt;sup&gt;4)&lt;/sup&gt;</td>
</tr>
<tr>
<td><strong>Campylobacter</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pork&lt;sup&gt;5)&lt;/sup&gt;</td>
<td>Generally low prev. in pork (0.2% in samples of minced pork). No data on differences in production systems or domestic vs. imported.</td>
<td></td>
</tr>
<tr>
<td>Chicken&lt;sup&gt;6)&lt;/sup&gt;</td>
<td>Conv.: 37% Org.: 100% Higher prevalence in organic chicken</td>
<td>Danish chilled: 31% Danish frozen: 19% Case-by-case (batch): 27.7%</td>
</tr>
<tr>
<td></td>
<td>Higher prev. in chilled than frozen, but difference has decreased</td>
<td>Higher prev. in imported Imp. chilled: 51% Imp.: frozen: 34%</td>
</tr>
<tr>
<td></td>
<td>Numbers of Campylobacter are higher in chilled meat than frozen meat</td>
<td></td>
</tr>
<tr>
<td>Egg</td>
<td>No known Campylobacter risk associated with consumption of eggs</td>
<td></td>
</tr>
<tr>
<td>Resistant bacteria</td>
<td>Pork, chicken meat and egg&lt;sup&gt;7)&lt;/sup&gt; Lower level of resistant bacteria in organic productions pig production</td>
<td>More resistant bacteria in Salmonella in imported pork and chicken</td>
</tr>
</tbody>
</table>

Notes:

1. **SALMONELLA IN PORK. Production system:** Zheng et al. (2007) and Wingstrand et al. (2009) both tend towards higher prevalence in conventional production. **Processing:** Meat from the front end of the pig is more easily contaminated during slaughter; it is also chewier and therefore often used in processed products. For the effect of freezing, see Schmidt (1986). **Imports:** See Table 2.

2. **SALMONELLA IN CHICKEN. Production system:** Insufficient data for comparison. **Processing:** Notermans (1975). **Imports:** See Table 2.

3. **SALMONELLA IN EGGS. Production system:** Anonymous (2006) p. 16, Hald et al. (1999); Hald et al. (2002). **Processing:** Anonymous (2006) p. 15. **Imports:** See Table 2.

4. **CAMPYLOBACTER IN PORK. Danish:** The prevalence of Campylobacter in Danish pork is very low: 0.2% in minced pork according to the 2002 surveillance (Anonymous, 2003). At the same time, the prevalence in pig herds is rather high: in 2007, the prevalences of C. coli and C. jejuni were 76.6% and 1.9%, respectively (Anonymous 2009, p. 44).

5. **CAMPYLOBACTER IN CHICKEN. Production system:** Data from 1998–2000 indicate that all organic chicken flocks were infected with Campylobacter as against 37% of conventional chicken flocks (Heuer et al., 2001). In 2006, the prevalence of Campylobacter in conventional chicken flocks had reduced to 30% (Anonymous, 2006, p. 24). **Processing:** Prevalence of 31% in chilled Danish chicken and of 19% in frozen Danish chicken in 2007 (Anonymous, 2009, p. 39). The prevalence in imported chilled chicken was 51% and 34% in frozen imported chicken in 2007, Anonymous (2009) p. 39. **Imports:** See Table 2.

The importance of relations between risk and quality characteristics for public health depends on how much consumers eat of the different types of meat and egg. The market shares for organic chicken meat and pork are very small, at around 1% in 2004, whereas the market share for organic eggs was around 15% in 2004. For all categories, the trend is towards higher market shares for organic varieties. Where the reduction of *Salmonella* risks is concerned, this trend seems to be a good thing: first, because *Salmonella* prevalence tends to be lower in non-conventional pig herds than it is in conventional pig herds; second, because no significant differences between *Salmonella* prevalence in layer flocks from different production systems have been found (and the prevalence is generally very low in layer flocks); and third, because no differences between chicken meat from different production systems have been documented due to lack of data (but the prevalence is generally very low in conventional flocks). When the aim is to reduce *Campylobacter* risks, on the other hand: increased sales of organic chicken meat is a negative thing; increased sales of pork and eggs do not pose any known risks, as there are no known differences in *Campylobacter* risks with respect to different production systems; and, generally, the *Campylobacter* risks are considered to be negligible in pork and eggs.

The small market shares of safer food varieties indicate that consumers are unwilling to pay for safety. Safer variants, such as chicken meat that is free from *Salmonella* and/or *Campylobacter*, are marketed today. It should be noticed that pasteurized eggs had a market share of around 4% in 2004, and that this share is growing. Actually, the Danish chicken meat market is dominated by *Salmonella*-free chicken meat, as Danish production of chicken meat is largely free from *Salmonella*. However, as the chicken meat is not always labelled as *Salmonella*-free, it is not possible to elicit information on consumer preferences from actual purchase data. The market shares of *Campylobacter*-free are so small that availability can be a real obstacle to demand in the short run. Similarly, therefore, consumer preferences for *Campylobacter*-free chicken meat cannot be inferred from actual purchase data. More generally, insufficient knowledge and insufficient labelling can also hinder demand-driven safety improvements in food.

As long as there are zoonotic risks associated with meat, it will be possible to reduce risk by reducing meat consumption – all else being equal. The consumption of pork

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15 The relations between risk and quality are described in greater detail in the report, where full references are supplied.
has decreased, which – all else being equal – is a risk-reducing factor. Still, pork accounts for around 50% of meat consumption in Denmark. The most popular type is minced pork, with a market share of 25% of pork during the period 1997–2004. Rising imports of chicken have also been observed, and – all else being equal – these can increase the risk of salmonellosis as well as campylobacteriosis. Speculation that there had been a shift from frozen to chilled chicken meat could not be verified in data for the period 1997–2004. Of course, the safety impacts of all these risks and trends in consumption are highly dependent on what happens when we relax the assumption that everything else is equal. For example, the safety implications of declining consumption of pork depends on whether the decline is part of a general reduction in meat consumption or a shift towards imported chicken meat.

0.6. Conclusion and perspectives

The situation in 2005–2007 leads us to conclude that chicken poses the most serious bacterial problem, especially with respect to Campylobacter. Salmonella risks in Danish chicken are small, but in imported chicken they are rather high. In addition, a large share of chicken has large numbers of Campylobacter. It is considered that the health risks presented by Campylobacter in pork and eggs are at most very small and perhaps zero.

The high level of consumption of pork has a slightly decreasing trend, whereas the consumption of eggs and (in particular) chicken meat has increased over the last 10–15 years. Still, the consumption of pork is around three times greater than that of chicken meat.

The Danish Salmonella source account system makes it possible to estimate the source, in terms of type of animal product and place of origin, in one in two registered domestically acquired cases of Salmonella. Further improvement of the system, and the implementation of similar source account systems for Campylobacter, would certainly improve the precision and validity of data that are used in political decisions. So would improved precision of the registration rate. It is also worth mentioning that the present report has focused merely on the presence of pathogenic bacteria: that is, the aim is to determine whether the tested item (e.g. a carcass) has, or does not have, bacteria in it, and then, given a large enough batch of results, to calculate a percentage figure from this. However, the number of Campylobacter and Salmonella bacteria in a food product is also an extremely important determinant of the risk of human illness. Systematic communication of not only prevalence but also the number of bacteria in...
different products would therefore shed valuable light on the links between risks in the product and human risks.

Trade and the exchange of food between countries are increasing. On one hand, imports of pork and, even more so, chicken meat have risen; and this means that food safety policy in Denmark has to give more serious consideration to the fact that imported meat typically has higher levels of and more resistant bacteria. On the other hand, Denmark exports more pork and chicken than she imports, which implies that consumers in other countries also benefit from a stringent Danish food policy. Hence, the increased exchange of food between countries must be taken into account in future food safety policies. The Danish expectation that the EU will grant special status to eggs (with a zero tolerance) is a very recent example of how to use international institutions to improve food safety. In addition, at EU level there are currently restrictions on trade with eggs from layer flocks found to be positive for Salmonella typhi-murium or Salmonella enteritidis; such eggs cannot be sold as eggs for private consumption.16

No single policy initiative can possibly deal with all of the above hazards and trends. In recognition of this, we shall conclude by suggesting several policy initiatives that might reduce zoonotic risks. First, it could be made easier to buy goods with reduced zoonotic risks (influence demand). Second, the consumer’s understanding of zoonotic risks and how to avoid them could be increased (educate consumers). Third, information about the sources of human infections could be developed and improved (stimulate research). Fourth, the supply of safer food could be expanded (manage supply). Fifth, pressure could be put on other countries to mitigate risks (give attention to the international political environment).

16 See (EF) Nr. 1237/2007. Forordn. om ændring af Europa-Parlamentets og Rådets forordning (EF) nr. 2160/2003 og af Rådets beslutning 2006/696/EF for så vidt angår markedsføring af æg fra salmonellainficerede flokke af æglæggende høner. We want to thank Gudrun Sandøe, of the Danish Veterinary and Food Administration, for this reference.
Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter
1. Introduction

1.1. Background and purpose

Every year, several thousand Danes are infected by the foodborne bacterial pathogens *Salmonella* or *Campylobacter*. This leads to considerable losses for the individual as well as society. Over the last decades, *Salmonella* and *Campylobacter* have been the two most frequent human zoonoses although other enteric pathogens (such as *Listeria, Yersinia* and *E. coli*) also cause human infections.

*Salmonella* infections are typically associated with meat and eggs, while *Campylobacter* infections are mainly linked to poultry meat. Since 1989, Denmark has implemented national action plans for the control of *Salmonella* in poultry, pork, eggs and beef. National surveillance schemes concerning *Campylobacter*, resistant bacteria, and medical residues in food have also been in place since mid 1990’s (www.food.dtu.dk). However, the first official action plan on *Campylobacter* was not formulated until 2008. These initiatives have reduced, but not eliminated the risks. As a consequence, the Danish Ministry of Food, Agriculture and Fisheries financed three research projects in 2005 with the overall aim to reduce zoonotic risks in chicken meat and pork using microbiological, sociological as well as economic evaluation criteria.

Consumers can affect their own foodborne risks through their choice of food, depending on their awareness of the risks associated with different food products and the labelling of the food. However, very few products are brought to the market exclusively for their safety attributes - and market shares of ‘safer’ products are small. Examples of ‘safer’ products include pasteurized eggs and *Salmonella* and/or *Campylobacter* free chickens. It is interesting to note that the supermarket chain COOP has chosen to sell only Danish chicken meat that is guaranteed Salmonella-free, but often the chicken meat is not labelled Salmonella-free. Small market shares, incomplete product information, and the fact that food risks affect others than the consumers and pro-

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17 Zoonoses are pathogens that can spread from animals to humans
18 The Campylobacter action plan is described in DVFA (2008).
19 In 2005, the Danish Ministry of Food, Agriculture and Fisheries financed the research program “The Food Sector of the Future” (Fremtidens Fødevaresektor). The present report is part of 3 of the initiated projects (CAMPY, DECONT and QUALYSAFE). For further information, see http://ferv.fvm.dk/Projekter.aspx?ID=33727
ducers that are directly involved (a so-called externality effect)\textsuperscript{20} imply that market data provide little information about consumer and social values of safer food. Hence, market shares are not very precise indicators of consumer (and social) preferences for safety characteristics\textsuperscript{21}. Nevertheless, market shares for animal products reflect consumers’ actual behaviour. Hence, the market shares of different product groups provide information about the human health risks that are associated with consumers’ actual market behaviour. Therefore, we have chosen to focus on market shares in the present study. Analyses of consumers’ underlying preferences are included elsewhere in the projects.

A number of studies suggest a relationship between food safety (microbiological, chemical-related, etc.) and other product characteristics such as production system, processing characteristics and country of origin. Even though distinctions between production systems are typically based on animal welfare aspects, differences in safety aspects might occur as side effects. As a consequence, market shares of meat produced within specific production systems, with specific processing characteristics or originating from different countries also provide information about human health risks associated with consumers’ market behaviour.

The purpose of the report is to describe the zoonotic risks related to trends in consumption of meat and eggs. To pursue this goal, we basically need to answer two questions: 1) What are the risks associated with different types of meat products? 2) How large is the consumption of the different types of meat products?

We use publicly available statistics of market data and consumption patterns to provide an overview over market shares and trends in the markets for various animal products. By linking information about market sizes and trends in these markets with

\begin{footnotesize}
\textsuperscript{20} Together, these factors might also be denoted as market failures.
\textsuperscript{21} Other, and more direct, methods for eliciting consumer preferences for food safety include hypothetical valuations and hedonic pricing. In hypothetical valuation studies, consumers are involved in experiments in which they reveal their preferences for food safety (Bateman et al., 2002). A survey over studies concerning willingness to pay for food safety attributes in meat is found in Mørkbak et al. (2008b). Another approach is to use econometric analyses of market data to extract information about individual characteristics (hedonic valuation). This method is not often used in a food safety context due to small market shares and lack of data. These methods allow a more detailed and thorough investigation of consumer perceptions and behaviour in relation to food safety – but at the same time they are much more time and resource consuming. The method we apply provides a rough overview of trends and links between consumers’ market behaviour and zoonotic risks.
\end{footnotesize}
scientific knowledge about different hazards, we try to assess the relative importance of different zoonotic hazards and whether trends in consumption patterns pose increasing/decreasing pressure on food safety. Thereby, the report aims at providing information about consumer behaviour as well as highlighting the relative importance of different zoonotic hazards.

Our report focuses on *Salmonella* and *Campylobacter* in pork, chicken meat and eggs. Other types of meat such as beef, turkey, and duck are only included in the analysis when it is found necessary for understanding the overall picture.

### 1.2. Zoonoses in Denmark

The symptoms of salmonellosis as well as campylobacteriosis include watery and frequently bloody diarrhoea, fever, abdominal pain and cramps, nausea and vomiting. Sequelae including neurological and joint affection may occur, although less frequent. The Danish Zoonosis Centre at the Danish National Food Institute, DTU, provides annual reports on zoonoses in Denmark (Anonymous, 2009).

In 2007, 3868 cases of campylobacteriosis and 1647 cases of salmonellosis were reported. As only a fraction of infected persons seek medical help, the true number of illnesses is generally believed to be 5 to 20 times higher (Korsgaard et al., 2005). This implies that the actual number of campylobacteriosis might be up to 77000 and that there might be up to 33000 cases of salmonellosis. In addition, it is estimated that around 0.5 % of the registered campylobacteriosis patients (Helle Korsgaard, National Food Institute, The Technical University of Denmark, personal communication, 2007) and 2 % of the registered salmonellosis patients will die prematurely as a consequence of their infection (Helms & Korsgaard, 2008). Hence, it is estimated that in 2007, 19 persons died prematurely due to campylobacteriosis and 33 persons died prematurely due to salmonellosis.

It seems to be a reasonable assumption that the same shares of actual cases of illnesses are registered for *Salmonella* and *Campylobacter*, respectively. In that case, *Campylobacter* bacteria have caused twice as many cases of human infections as *Salmonella* over the recent years, but at the same time salmonellosis causes twice as many premature deaths as campylobacteriosis. Figure 1.1 illustrates the development in registered human cases of salmonellosis and campylobacteriosis.
Figure 1.1 shows that there has been a significant reduction in the cases of salmonellosis from more than 5000 cases in 1997 to around 1600 cases in recent years. The salmonellosis cases attributed to chicken peaked in 1988, those attributed to pork peaked in 1994, and those related to eggs peaked in 1997. The burden from campylobacteriosis peaked in 2001 reaching 4620 human cases (Anonymous, 2009, p. 6). During the period 1999 – 2007, Campylobacter has been the leading source of bacterial human diarrhoea.

The Danish Zoonosis Centre has developed a mathematical model to estimate the contribution from the major animal food sources to human Salmonella infections (Hald et al., 2004) which makes it possible to estimate a Salmonella source account. Table 1.1 presents the number of reported human cases of salmonellosis in Denmark in 2005-2007, categorised according to source in terms of product and whether it is produced in Denmark or imported (Anonymous, 2009, p. 14).
Table 1.1. Number of reported human cases of salmonellosis attributed to pork, beef, chicken, duck, turkey, and table eggs for Danish and imported products (in %)

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of reported human cases</td>
<td>1,775</td>
<td>1,658</td>
<td>1,647</td>
</tr>
<tr>
<td>Domestically produced pork</td>
<td>12.1</td>
<td>6.1</td>
<td>6.5</td>
</tr>
<tr>
<td>Domestically produced beef</td>
<td>1.5</td>
<td>1.4</td>
<td>0.8</td>
</tr>
<tr>
<td>Domestically produced chicken</td>
<td>4.1</td>
<td>0.5</td>
<td>0.8</td>
</tr>
<tr>
<td>Domestically produced ducks</td>
<td>0.7</td>
<td>0.7</td>
<td>-</td>
</tr>
<tr>
<td>Table eggs</td>
<td>12.1</td>
<td>6.2</td>
<td>11.0</td>
</tr>
<tr>
<td>Imported pork</td>
<td>2.5</td>
<td>1.6</td>
<td>1.3</td>
</tr>
<tr>
<td>Imported beef</td>
<td>3.7</td>
<td>1.3</td>
<td>1.2</td>
</tr>
<tr>
<td>Imported chicken</td>
<td>10.9</td>
<td>9.2</td>
<td>3.7</td>
</tr>
<tr>
<td>Imported turkey</td>
<td>1.0</td>
<td>5.2</td>
<td>0.7</td>
</tr>
<tr>
<td>Imported duck</td>
<td>0.4</td>
<td>0.7</td>
<td>-</td>
</tr>
<tr>
<td>Travels1)</td>
<td>24.0</td>
<td>24.7</td>
<td>46.3</td>
</tr>
<tr>
<td>Unknown source, including outbreaks of unknown source1)</td>
<td>27</td>
<td>42.3</td>
<td>27.8</td>
</tr>
</tbody>
</table>

Main categories (product) – total

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pork total</td>
<td>14.6</td>
<td>7.7</td>
<td>7.8</td>
</tr>
<tr>
<td>Beef total</td>
<td>5.2</td>
<td>2.7</td>
<td>2.0</td>
</tr>
<tr>
<td>Chicken total</td>
<td>15.0</td>
<td>9.7</td>
<td>4.5</td>
</tr>
<tr>
<td>Other poultry total</td>
<td>2.1</td>
<td>6.6</td>
<td>0.7</td>
</tr>
<tr>
<td>Table eggs</td>
<td>12.1</td>
<td>6.2</td>
<td>11.0</td>
</tr>
</tbody>
</table>

Main categories (origin) – total

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Danish meat</td>
<td>18.4</td>
<td>8.7</td>
<td>8.1</td>
</tr>
<tr>
<td>Table eggs</td>
<td>12.1</td>
<td>6.2</td>
<td>11.0</td>
</tr>
<tr>
<td>Imported meat1)</td>
<td>18.5</td>
<td>18.0</td>
<td>6.9</td>
</tr>
</tbody>
</table>

1) Registration of travel history was significantly improved in 2007, leading to an increase in travel related cases and fewer cases attributed to imported meat and of unknown source.

Source: Anonymous (2009). Aggregations into main categories are own calculations.

Excluding the large outbreaks in 2008, the numbers of human cases have been rather stable over the last couple of years but the contributions from different sources have changed. In 2007, an improved method for estimating the number of travel-related cases of salmonellosis resulted in a significant increase in that number (from around 24 % of the registered cases in 2005 and 2006 to 46 % in 2007). Comparisons between years must therefore be interpreted with caution. Data from 2007 are to be considered as the more valid data. This increase occurred at the expense of the categories imported meat (which fell from around 18 % of the registered cases in 2005 and 2006 to less than 7 % in 2007) and unknown (27 % of the registered cases were categorised as unknown in 2005, 42.3 % in 2006 and 27.8 % in 2007).
Within the category of Danish meat and egg, pork is responsible for more cases of salmonellosis than chicken. During the period 2005-2007, there was a significant reduction in the cases of salmonellosis from pork and chicken, while no clear trend was observed for salmonellosis from eggs.

Within the category of imported products, imported chicken accounts for more cases of salmonellosis than imported pork despite a significant reduction in the cases of salmonellosis from imported chicken meat from 2006 to 2007.

When comparing pork and chicken meat, without distinguishing between domestic and imported meat, the salmonellosis burdens from pork and chicken meat are quite similar in 2005 – 2007. The largest difference is estimated in 2007 where pork accounts for 1.7 times as many cases of salmonellosis as chicken meat. And, when comparing domestic and imported meats without distinguishing between different types of meat, the burdens from Danish meat is quite similar to the burden from imported meat.

Eggs contributed with 11 % of the cases of salmonellosis in 2007 which is a considerable share. That might at a first sight seem surprising because the risk in the individual egg is considered to be small. The import of eggs is not considered to constitute high risks because imported eggs are mainly used by the industry. However, imported table eggs have been found in Danish shops and it is likely that increased import of table eggs would constitute a risk factor. Studies show that the prevalence of Salmonella is typically higher in layer flocks in other countries (see Table 1.2, note 3). In the Salmonella source account, human cases of salmonellosis from imported eggs would be registered as cases related to Danish table eggs or unknown source as there is presently no account of the Salmonella prevalence in imported table eggs. Consumers’ handling of eggs and a higher Salmonella prevalence in imported might be risk factors that are worth looking into in relation to reducing the human cases of salmonellosis.

It is worth noticing, that the relative importance of different places of origin and different types of meat and eggs is based on 72.3 % of the registered cases. Hence, identifying the source of the remaining 27.8 % of the registered cases and/or increasing the rate of registration could change this picture. In addition, it should be noticed that the relative importance of sources changes considerably from year to year.
For *Campylobacter*, a similar account system with detailed information about sources of infections is not available yet. However, it was shown that around one third of the cases of campylobacteriosis are travel-related (Anonymous, 2005, p. 22) and SSI (2009) and that the majority of cases are related to poultry (Anonymous, 2006 p. 23). More precisely, chilled chicken meat has been identified as the main food source of campylobacteriosis in Denmark (Wingstrand et al., 2006). The numbers of registered cases of campylobacteriosis within recent years have been 3671, 3242 and 3868 cases in 2005, 2006 and 2007, respectively.

It is clear that a substantial share of the human cases of salmonellosis and campylobacteriosis are obtained during travel outside Denmark, and hence beyond the reach of domestic policy interventions. For another major part of the infections, the sources are unknown and as a consequence, it is not possible to direct any policy measures towards them. At the same time, Table 1.1 highlights that pork, poultry meat and eggs on the domestic market – imported as well as domestically produced - are important sources of the human occurrences of such infections in Denmark.

Antimicrobial resistance has become an increasing problem in recent years. From a Danish perspective, the increasing internationalisation of food markets has given rise to some concern in this respect, as the level of antimicrobial resistance in domestic production is relatively low, compared with other European countries (EFSA, 2007a, pp. 243-244), as well as worldwide. Thus, imported foods play an important and increasingly problematic role for controlling the level of antimicrobial resistance in Denmark. Hazards associated with antimicrobial resistant agents are included in discussions on import-related hazards but are not described in greater detail in the present report.

To sum up, over the recent years *Campylobacter* bacteria have caused twice as many cases of human infections as *Salmonella* but at the same time salmonellosis have caused twice as many premature deaths as campylobacteriosis. *Salmonella* risks are attributed to chicken meat, pork and egg. Roughly the same number of human infections of salmonellosis could be attributed to pork and chicken during the period 2005 - 2007. And, roughly the same number of cases of salmonellosis could be linked to domestic and imported meat in 2007 (18 % each) – in addition, eggs accounted for 11 % of the registered cases of salmonellosis. The remaining 74 % of the registered cases in 2007 were either travel related (46 %) or from unknown sources (28 %). Campylo-
bacteriosis is mainly associated with consumption of chicken meat and one third of the cases are believed to be travel related.

### 1.3. Hazards and qualities

The zoonotic risks associated with some production systems or products are well-documented whereas risks from other systems or products are more hypothetical. Table 1.2 provides a short overview over known differences in risks categorized according to type of produce (pork, chicken, and egg) and according to quality categorizations in terms of production system, processing and place of origin.

The overall picture is that food safety and animal welfare are closely linked as regards *Campylobacter* in broilers. In broiler production, the prevalence of *Campylobacter* bacteria is significantly higher in organic chicken production than in conventional chicken production. Hence, consumers basically have to choose between *Campylobacter* and welfare for the broilers. For pork and eggs, there are no known *Campylobacter* risks. Recent studies by Zheng et al. (2007) and Wingstrand et al. (2009) find indications of a lower prevalence of *Salmonella* in pigs from Danish non-conventional production systems (from Friland ®) than from conventional systems. Hence, it does not seem to be necessary to trade-off between *Salmonella* and welfare for the pigs. There are no documented differences in *Salmonella* risks in chicken meat (lack of data) or eggs (no differences found) from different production systems. Based on the literature and our own findings, it is our impression though, that consumers’ choice of products from a non-conventional production system is motivated by concerns for animal welfare rather than by food safety concerns. A plausible explanation is that the typical consumer is not aware of this link between food safety and production system.

Another safety aspect related to production systems is that regulation in the use of antibiotics in production is stricter in organic production. As the use of antibiotics is considered the single most important factor in the risks of developing resistant bacteria, these risks may be presumed to be lower in organically produced pork. Results from Struve et al. (2009) support this.
Table 1.2. Overview over zoonotic risks in pork, chicken meat and egg differentiated between production system, processing and country of origin (the year is 2007 when no other year is mentioned). Due to differences in sampling, the prevalence in different product categories cannot be directly compared.

<table>
<thead>
<tr>
<th></th>
<th>Danish</th>
<th>Production system</th>
<th>Processing</th>
<th>Import</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salmonella</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pork</td>
<td>Slaughter (carcass): 1.1 %</td>
<td>Higher prev. in pigs from conventional productions</td>
<td>Higher prev. in minced pork than in roast</td>
<td>Case-by-case (batch): 13.1 %</td>
</tr>
<tr>
<td></td>
<td>Case-by-case (batch): 11.3 %</td>
<td></td>
<td>Higher prev. in pork from the front than rear</td>
<td>Traditionally higher prev. in imported pork – but not so in 2008</td>
</tr>
<tr>
<td>Chicken</td>
<td>Slaughter (flock): 1.2 %</td>
<td>No data</td>
<td>Freezing reduces Salmonella risk in chicken</td>
<td>Case-by-case (batch): 14.5 %</td>
</tr>
<tr>
<td></td>
<td>Case-by-case (batch): 1.6 %</td>
<td></td>
<td></td>
<td>Higher prev. in imported chicken</td>
</tr>
<tr>
<td>Egg</td>
<td>1 % (layer flocks, DK surveillance)</td>
<td>No significant differences</td>
<td>Pasteurization of eggs significantly reduces prev. and number of Salmonella counts</td>
<td>EU-average: 30.7 % (0-80 %)</td>
</tr>
<tr>
<td></td>
<td>2.4 % (layer flocks, EU baseline)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Campylobacter</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pork</td>
<td>Generally low prev. in pork (0.2 % in samples of minced pork)</td>
<td></td>
<td></td>
<td>Case-by-case (batch): 27.7 %</td>
</tr>
<tr>
<td>Chicken</td>
<td>Slaughter (meat samples): 8.2 %</td>
<td>Conv.: 37 % Org.: 100%</td>
<td>Higher prev. in chilled than frozen, but difference has decreased</td>
<td>Higher prev. in import</td>
</tr>
<tr>
<td></td>
<td>Case-by-case (batch): 15.1 %</td>
<td>Higher prevalence in organic chicken</td>
<td>Numbers of Campylobacter are higher in chilled meat compared to frozen meat</td>
<td>Imp. chilled: 51 % Imp.: frozen: 34 %</td>
</tr>
<tr>
<td>Egg</td>
<td>No known Campylobacter risk associated with consumption of eggs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Resistant bacteria</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pork, Chicken, Egg</td>
<td>Lower level of resistant bacteria in organic productions pig productions</td>
<td>More resistant bacteria in Salmonella in imported pork and chicken</td>
<td>More resistant bacteria in Campylobacter in imported chicken</td>
<td></td>
</tr>
</tbody>
</table>
Many consumers consider the degree of processing as simply an indicator of convenience but processing might also be a relevant categorization in a food safety perspective. The freezing process is known to markedly reduce the contamination level of most bacteria. This is reflected in the data as the prevalence of Campylobacter is generally found to be higher in chilled chicken meat than in frozen chicken meat. The gap has decreased in recent years but still, the number of Campylobacter bacteria is higher in chilled than frozen. For Salmonella in chicken meat, a five fold reduction by freeze-
Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter

ing has been reported (Notermans, 1975). As a consequence, the Danish broiler industry introduced a logistic slaughtering system in 2002 where Campylobacter-negative flocks were allocated to chilled products and Campylobacter-positive flocks were used for frozen products to the possible extend. In addition, recent research has shown that some marinades might work as decontaminants. Pasteurized egg is probably the product that most distinctively is defined by its safety characteristic – and this is a safety characteristic independent of animal welfare aspects. The level of bacteria is often higher at the cutting surface of the meat than inside the meat. As bacteria from the cutting surface might spread to the inside during processing, there is an increased risk of bacteria in meat the more the meat is handled. Consequently, minced meat is potentially associated with a higher risk. To reduce this risk, special atmosphere packaging has been developed. Another aspect of cut-related safety of meat is that the level of bacteria tends to be higher in cuts from the front of the animal than in cuts from the rear end: Meat from the front part of the pig is easier contaminated during the slaughter. In addition, it is chewier and therefore often used in processed products.

Foreign trade is an important economic factor in a small open economy as the Danish. This is also true from a food safety perspective as there are huge differences between food safety standards across countries. The following links between food safety and place of origin are documented on www.food.dtu.dk: 1) The prevalence of Salmonella is higher in imported pork and chicken than in Danish pork and chicken 2) Resistant antimicrobial agents in Salmonella are more common in imported meat than in Danish meat 3) Relatively speaking, more human cases of Salmonella infections are estimated to be related to imported meat than to Danish meat.

In summary, the links between production system and zoonotic risks are rather complex. With respect to Salmonella in pork, results indicate that outdoor productions tend to have a slightly lower prevalence but there are no documented differences for Salmonella in chicken meat (lack of data) or eggs (no significant differences found). With respect to Campylobacter in chicken, outdoor productions have a significantly higher prevalence. With respect to Campylobacter in pork, there are no data from alternative production systems and therefore we cannot conclude on relations between

22These are investigated in the research project CAMPY, see http://www.vet.dtu.dk/Default.aspx?ID=10919
23Information concerning hazards and processing characteristics of pork are kindly provided by DVFA (unpublished results).

Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter
production system and occurrence of Campylobacter. However, Campylobacter risks are generally considered to be negligible in pork and eggs. Freezing significantly reduces the effect on the level of bacteria in chicken meat but not so distinctively in pork (and freezing is not relevant in eggs). With respect to pork, it is documented that there is an increased risk of bacteria the more the meat is handled. No such documentation exists for the effects of handling of chicken. With respect to chicken, Salmonella and Campylobacter levels are higher in imported products. With respect to pork, Salmonella prevalence has traditionally been higher in imported pork but the case-by-case control in 2008 showed almost same prevalence as in Danish pork. With respect to eggs, there are significantly larger Salmonella risks in layer flocks from most other countries but the risk to human health in Denmark has so far been considered to be small as Denmark mainly imports eggs for processing. Antimicrobial resistance in Salmonella is more common in imported meat than in Danish meat.

1.4. Organisation of the report

The report focuses on describing market shares and patterns of foreign trade in products that are categorized according to differences in production systems, processing characteristics and place of origin. We seek to include those product categories for pork, chicken meat and eggs that are available and relevant in relation to microbiological food safety. Chapter 2 contains a general introduction to production, consumption, and foreign trade in general categories of food and beverages. Subsequently, detailed analyses are provided for the markets of pork products (Chapter 3), chicken meat (Chapter 4) and eggs (Chapter 5). Discussion of results and conclusions are provided in Chapter 6. A large part of the data documentation is placed in Appendix A to G.
2. The Danish food and beverage markets – focusing on animal products

The importance of food production and food consumption for the Danish economy is described with particular emphasis on meat and egg. The focus is placed on describing structural features of the Danish food and beverage markets on an aggregate level. The supply sides as well as the demand sides are included in the overall analysis of food markets importance for the Danish economy. The three subsequent chapters which constitute the heart of the report contain detailed analyses of consumptions and expenditures of pork, chicken meat and egg markets, respectively. The present chapter contains a short presentation of the food industry (Section 2.1), overall developments in food expenditures (Section 2.2), consumption patterns in quantities (Section 2.3), foreign trade (Section 2.4), and summary and discussions (Section 2.5).

Just to clarify the notation, we use the term *expenditure* when consumption is measured in values (nominal or fixed price) and *consumption* when measured in quantities. Complete lists and descriptions of used statistics are found in Appendix A (a description of the indicators we have used for consumption, production, trade, and prices), Appendix B (an overview of data sources), Appendix C (categorisations in the databases of Statistics Denmark), and Appendix D (description of data used in Chapter 2).

2.1. Production of food and beverages

The relative importance of food and beverage production for the Danish economy is assessed by comparing the value of food and beverage production with the overall value of production in Denmark. Figure 2.1 shows the development in the food and beverage industry in absolute as well as in relative values. In absolute terms, the volume of the food and beverage production increased over the period 1990-2004 whereas the relative importance of the food and beverage production in Denmark was gradually decreasing from 6.5% of total value of Danish production in 1990 to just over 5% in 2004 (Source: DST1). In addition to the direct economic influence, the

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24 Total production includes production of material as well as immaterial goods, e.g. agriculture, health care, administration, education.

25 A development in real values isolates the development in production quantities as opposed to a development in nominal terms that includes changes in prices and quantities.

26 The total value of the Danish agricultural production and processing industry amounted to 122 billion DKK in 2004. Total value-added was around 50 billion DKK, which represents about 4% of the national value added.
agricultural sector and the food industry have significant impacts on a number of other industries, including construction, production of machinery, and the biotechnology industry.

The food and beverage production in the period 1990-2004 can be divided into six main categories (meat, dairy, fish, fruit and vegetables, beverages, other)\(^{27}\) to analyse the relative importance of different food categories (based on the statistics DST1) – not shown graphically. These are not illustrated graphically. The two largest categories in 2004 were meat (33 %) and other (30 %). For comparison, the dairy industry constituted 19 %, fish and beverages each accounted for around 8 % and fruit and vegetables accounted for around 3 %. Overall, the composition of the food and beverage production has been rather stable with a slight increase in meat and other at the expense of a slight decrease in the remaining four industries.

\(^{27}\) The categories are as listed in Appendix C.

52  FOI  Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter
2.2. Food and beverage expenditures

The development in private expenditures on food and beverage from 1990 to 2005 are shown in Figure 2.2 in both nominal and real terms. Consumers spent 38% more money on food in 2006 than they did in 1990. A large part of this increase was due to price increases and the real increase in food consumption was close to 13%. For beverages, the expenditures and real consumptions have also risen but at slightly lower rates.

Figure 2.2. Development in expenditures of food and beverages by Danish households measured in nominal prices and in 2000-prices. Year 1990=index 100

Despite an increasing trend, expenditures on food and beverages have fallen relative to other private consumption expenditures (not illustrated graphically). Almost 13% of the private expenditures in 1990 were spent on food, while the share in 2005 was 10%. A similar development is seen for beverages as the share of total expenditures spent on beverages decreased slightly and accounted for just below 4% of total expenditures in 2005 (own calculations based on DST1).

Source: Own aggregations based on DST1.

28 The development in real terms represents development in quantities (by eliminating the effects of changing prices) while the development in nominal terms indicate development in expenditures.
These expenditures can be distributed between different categories of food and beverages (meat, dairy, fruits and vegetables, non-alcoholic beverages, alcoholic beverages, fish, eggs, other) – not illustrated graphically. Note that beverages are now subdivided into alcoholic beverages and non-alcoholic beverages. Furthermore, note that eggs are now placed in a separate category and include all eggs as opposed to the description of production, where pasteurized and other processed eggs were included in the production values but not table eggs (appendix C provides further details on the categories). The general picture is that the composition of the food and beverage budget has been quite stable over the period 1990-2006. In 2006, meat accounted for 15% of expenditures. For comparison, the categories dairy, fruits and vegetables, non-alcoholic beverages, and alcoholic beverages each accounted for around 10%, fish and eggs each accounted for 3-4%, and 25% of private food and beverage expenditures were spent on other (own calculations based on the database DST1).

2.3. Consumption of meat and eggs

The effects on human health of zoonotic risks naturally depend on product risks but also on consumed quantities and frequencies of consumption. For example, a product that is highly infectious but only consumed in small quantities might cause less private and social costs in terms of life quality and in terms of economic costs than a product with low risk that is consumed in large quantities. In order to be able to include this aspect, consumption patterns with respect to meat and eggs are shown.

Development in meat and eggs consumption

Information concerning the development of meat consumption was found in Statistics Denmark DST2 for the period 1990-2007 for the four main categories: Pork, beef, poultry, and others. Figure 2.3 illustrates the development in meat consumption (measured in quantities, based on DST2) – but only available as ‘meat available for private and industrial consumption’.

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29 The category ‘other’ covers sheep, lamb, horse and game. Note that Figure 2.3 cannot be compared directly with Figure 2.2 where only private consumption is included. Note furthermore that the definition of meat for consumption was changed in 2005. Firstly, pig heads sent to destruction were no longer included in the consumption statistics. This change in the definition caused a decrease in the consumption of pork of 54 million kg in 2005. Secondly, the method used to estimate the number of home-slaughtered pigs and poultry was changed in 2005 such that the estimated numbers were lower than in the previous years. To address this problem, Figure 2.3 includes estimates for 2005-2007 using the new as well as the old calculation method.
The meat available for consumption (private plus industry) in Denmark is highly dominated by pork even though consumption of pork has steadily decreased in importance. In 1990, more than 70% of the meat available for consumption was pork which decreased to 52% in 2004. In contrast, still more poultry meat is consumed. In 2004, poultry covered 21% of meat consumption against 12% in 1990. Also consumption of beef has increased from 20% of meat consumption in 1990 to 25% in 2004.

Nutritional recommendations (aiming at reducing obesity, risks of diabetes 2, and cardiovascular diseases) have pointed towards less and leaner types of meat in order to decrease the level of, particularly saturated fat in the diet (Jensen et al., 2007). The development in meat consumption indicates that nutritional recommendations of less and leaner meats only partly are followed: Meat consumption has increased but there is a substitution from pork towards the leaner chicken meat.

Consumption of eggs (table and processed eggs to private households and the industry) from 1997-April 2006 is shown in Figure 2.4. The total sales of eggs in Denmark amount to 70-95 million kg per year with an increasing trend such that eggs consumed by private households and the industry was 25% higher in 2006 than in 1997.
Overall quantities of meats and eggs available for consumption for private households have increased. The composition of meat consumption has changed towards less pork and more poultry and beef.

Consumption of meat – using two different approaches
In the present section, private consumption of meat and eggs is described using two rather different methods. All information concerning consumption of meat and eggs is summarized in Table 2.1. A study by Lyhne et al. (2005) is based on a survey from 2000-2002 where 4000 Danes have self-reported their food intake over a period of 7 days. They estimate a total meat consumption of 51 kg/year for an adult person covering 41 kg of pork and beef and 10 kg of poultry. The other method is to use Statistics Denmark to estimate meat and eggs available for consumption in 2006 (see Andersen, 2007). They estimate a total meat consumption of 97 kg (covering 46% pork, 28% beef, 25% poultry and 2% other). Hence, the consumed quantities differ by almost a factor 2. One reason is of course that data are collected in different years. More im-

---

30 The category ‘other’ includes lamb, game, and horse meat (Andersen, 2007). The distribution is rather similar to the one indicated by Figure 2.3 where meat available for consumption in 2004 consisted of 52% pork, 25% beef, 21% poultry, and 2% others.
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Important however is that the estimates from Statistics Denmark do not properly account for imports, exports, re-exports, and to what extent offal is included - and as Denmark is a net-exporter of chicken meat as well as pork, the number is likely to be too high (Andersen, 2007). On the other hand, meat consumption in Lyhne et al. (2005) is likely to be underestimated due to strategic answering as the official recommendations of healthy diets include ‘less meat’ as one of the main recommendations.31

According to data from Danish Poultry Council32 (2007, p. 122), consumption of chicken meat in Denmark in 2006 was 18.8 kg, and the consumption of poultry was 23.5 kg (p. 118), which implies that chicken meat accounts for 80% of the poultry consumption. We have used that information in Table 2.1.

In Danish Agriculture (2006), the distribution between pork and beef is 63% pork and 27% beef. As Lyhne et al. (2005) do not distinguish between pork and beef we have simply adopted the same distribution as that found in Danish Agriculture (2006).

Our main interest in the consumption of different meat products lies in the ratio between pork and chicken rather than the actual quantities. Table 2.1 reveals that Danes on average eat between 2.5 (Statistics Denmark) and 3.3 (Lyhne et al. 2005) times more pork than chicken. It is not quite clear how the above mentioned uncertainties in methods for estimating the consumption of meat might affect the ratio between pork and chicken meat.

We will assume that the relative consumption of pork versus chicken is ‘remembered’ more accurately in the consumer survey (Lyhne et al., 2005) than in registrations in Statistics Denmark. Hence, the remaining report will use the quantities and distributions found in Lyhne et al. (2005) which is highlighted in Table 2.1.

31 The official eight advices for a healthy diet are described in Astrup et al. (2005)
32 ‘Det danske fjerkræråd’
Table 2.1. Consumption of meat and egg in Denmark

<table>
<thead>
<tr>
<th>Year of consumption</th>
<th>Statistics Denmark data, Andersen (2007)</th>
<th>Lyhne et al. (2005) based on consumer survey of food intake</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Consumption kg/inhabitant</td>
<td>Relative consumption of different meat products (%)</td>
</tr>
<tr>
<td>Pork</td>
<td>45</td>
<td>46</td>
</tr>
<tr>
<td>Beef</td>
<td>28</td>
<td>29</td>
</tr>
<tr>
<td>Poultry (hereof chicken 80 %)</td>
<td>22 (18 kg chicken)</td>
<td>23 (18 % chicken)</td>
</tr>
<tr>
<td>Others</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Meat total</td>
<td>97</td>
<td>100</td>
</tr>
<tr>
<td>Pork relative to chicken</td>
<td>2.5</td>
<td></td>
</tr>
<tr>
<td>Egg</td>
<td>17</td>
<td></td>
</tr>
</tbody>
</table>

Notes:
1. Both sources include in principle dining out etc.
2. In Lyhne et al. (2005) consumption is measured in gram/day – these ratios are re-calculated to kg/year.
3. Danes’ consumption of 17 kg according to Statistics Denmark is presented in Danish Agriculture (2007).

Hence, in 2000-2002 an average adult Dane ate at least 51 kg of meat per year. Around 3 times more pork than chicken is consumed. Meat consumption can roughly be divided into 50 % pork, 30 % beef, and 20 % poultry (16 % chicken and 4 % other types of poultry). In addition, each Dane consumes around 6 kg of eggs each year (corresponding to around 120 eggs).

*Danish food consumption patterns in a European perspective*

Danish food expenditures are compared with those in similar countries (Sweden, Norway, Finland, Iceland, Germany, France, UK, and an average of the EU-25 countries) for the period 1994 - 2005 (Figure 2.5). Due to differences in measurement methods across countries, the results should be interpreted with care.

All countries have spent decreasing shares of their total expenditures on food. We point towards two main explanations for this development: 1) Household’s real incomes – and hence the budget available for consumption – have been increasing, and the demand of food has not been increasing to the same extent 2) Foods have become relatively cheaper over time, due to cost-reducing productivity improvements as well as reforms of the agricultural policy. In recent years, Danish households spent 11-12
% of their total expenditure on foods and non-alcoholic beverages\(^{33}\). In all years, Danish food expenditures as share of total expenditures have been below the average of the EU-25 countries. In a Nordic perspective, the food expenditure share in Denmark is quite in line with Sweden and Finland, but somewhat lower than in Norway and Iceland, presumably due to relatively high food price levels in the latter two countries.

The consumption of meat products per capita in Denmark and in similar EU member states is illustrated in Figure 2.6 (Denmark, Sweden, Finland, Germany, France, UK).

---

\(^{33}\) Note that in Section 2.3, we estimated food expenditures to be around 10% of total expenditures in 2005 and that expenditures on beverages (alcoholic and non-alcoholic) were just below 4%. In the present Section, food and non-alcoholic beverages are estimated to account for 11-12% of total expenditures.
The overall picture is that in 2005, Denmark’s consumption of pork meat was among the highest per capita consumption of meat in Europe while the Danish per capita consumption of poultry meat of around 20 kg was around an average across countries. However, uncertainties related to differences between measurement methods across countries and the problem of not properly accounting for offal and re-exports (as mentioned earlier) imply that we are reluctant to make strong conclusions on national differences.

It should also be mentioned (but shown graphically) that the Danish consumption of eggs is estimated to be above the average across Europe (Danish Poultry Council, 207, p. 111).
2.4. Foreign trade in food and beverages

Denmark is a net-exporter of foods and beverages. Figure 2.7 captures the development in net exports of 6 categories of food and beverages. In 2005, the value of the foreign trade of food and beverage trade made up almost 13% of the total foreign trade in Denmark equivalent to approximately DKK 38 billion (own calculation based on the database DST3). The net export of meat accounted for more than 50% of value of net exports of food and beverages (increased from DKK 19.4 billion in 1990 to DKK 24.2 billion in 2005). Denmark is also a net-exporter of dairy products and eggs (valued jointly), and of fish but a net-importer of beverages as well as fruits and vegetables.

![Figure 2.7. Danish trade balance for individual categories of food and beverages in the period 1990-2006 in nominal prices](image)

Source: Own aggregations based on DST3.

Net exports in Figure 2.7 were presented in monetary terms. Imports and exports will be presented in quantities. Figure 2.8 shows the development in imports of food and beverages, measured in quantities.
Figure 2.8. The Danish import of individual categories of food and beverages measured in million kg, 1990-2006

From 1990 to 2006 the imported quantity of food and beverages increased from 3 million tons to 4.3 million tons – an increase of nearly 50%. The imported quantities of all categories of food increased during the period – only import of beverages decreased slightly.

The three largest categories of food and beverage imports in 2006 are other (45 %), fruit and vegetables (25 %), and fish (13 %). In example, the import of meat increased from 82 million kg to 283 million kg from 1992 to 2005. This is a large increase in relative terms but as the meat import started from a very low level, the import of meat still only constitutes around 6 % of total food and beverage import in 2005.

In 2005, the meat import could potentially cover 58 % of the Danish meat consumption. However, some of the imported meat is re-exported. The import shares of pork and chicken meat consumed in Denmark are estimated in section 3.2 and 4.2.

In 2005, the total quantity of food exported was approximately 5.7 million tons – a decrease of 12 % as compared to 1990 (see Figure 2.9). The two dominating export groups of food and beverages export are meat and other (a share of 35 % each). For comparison, the shares of exported fish and dairy each were approximately 10 % while fruit and vegetables and beverages constituted 6 % and less than 2%, respect-

62  FOI  Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter
tively. The decreased export is mainly caused by a sudden drop in 2004 of products in the category other and a reduction in the exports of beverages in 1999. Export of meat increased by 60% between 1992 and 2005. This corresponds to an increase of 750 million kg (and can be compared to the increased imports of meat of 200 million kg).

**Figure 2.9. The Danish export of food and beverages measured in quantities**

![Graph showing export of various food categories](image)

Source: Own aggregations based on DST3.

### 2.5. Summary and discussions on food and beverages

The food and beverage industry is an important sector in the Danish economy. Despite a decreasing trend, the production of food and beverages covered just over 5% of the total value of production in Denmark in 2004. The meat industry covered 33% of the food and beverage production value in 2004.

The average household in 2005 spent 10% on food out of their total expenditures compared to 13% in 1990. A comparison with other European countries indicates that the share of total budget allocated to food in Denmark seems to be below average.

The Danes’ relative expenditures on different food categories seem to have been rather stable between 1990 and 2006 with a slight increased demand for meat. Consumptions of poultry and eggs have increased during the period while the demand for pork has fallen. In 2004, meat products covered around 15% of the food and bever-
age budget. For comparison, around 10% of the food budgets were spent on fruits and vegetables and around 10% on dairy products.

It is roughly estimated that an average adult Dane in the period 2000-2002 ate at least 51 kg of meat per year consisting of 26 kg of pork, 25 kg of beef, 8 kg of chicken, and 2 kg of other types of poultry. In percentages, meat consumption can roughly be divided into 50% pork, 30% beef, and 20% poultry (16% chicken and 4% other types of poultry). Hence, consumption of meat was highly dominated by pork and, an average Dane consumes around 3 times more pork than chicken.

The Danish food sectors – and in particular the pork and chicken sectors – are highly export oriented, and the position as a large exporter of food has in general been maintained over the last decade. The meat export increased by 60% between 1992 and 2005. From a food safety policy aspect, the large and increasing export of Danish meat products constitute a challenge as improving the safety of domestic meat products to a large extent will benefit non-domestic consumers and put pressure on domestic producers.

During the same period, the import of food products has increased, most likely due to a strengthened integration of European markets, as well as increased market assess for third countries due to the GATT/WTO agreement in the early 1990’s. Especially the imports of meat, egg and dairy products have experienced large growth rates over the last 15 years.
3. Pork markets

Trends in the demand for pork products and their relations to zoonotic risks are investigated. Patterns of pork consumption are described in Section 3.1, foreign trade in Section 3.2 and summary and discussion in Section 3.3. A complete list and description of statistics used can be seen in Appendix E.

3.1. Consumption patterns

Pork consumption has declined since 1999, but it still makes up approximately half of the total meat consumption in Denmark (see Section 2.3). Pork is thus still the dominating type of meat on the Danish meat market.

From a safety perspective, the following categorisations of pork production are of main interest: Production systems (will be described in terms of brands of pork products as production system and brand are closely related), processing characteristics (will be described in terms of cuts and fat categories of minced pork), and trade. The categorizations are described in detail in Appendix E.

*Consumption categorized according to production characteristics and brand*

Between 2003 and 2008, the sale of organic pork\(^{34}\) in Denmark increased from 202 tons to 838 tons and in value terms the sales of organic pork increased from around 17 million DDK to around 74 million DDK (Statistics Denmark\(^{35}\)). Still, the market share of organic pork was less than 1% in 2004.

The price premium of organic pork was 20 - 30% in 2004 (own calculations based on GfK data). The estimated price premiums are rather uncertain even after adjusting for differences in cuts as only very limited purchases of organic pork were observed.

Table 3.1 shows different pork brands and their market shares in 2004. Only 6-7% of the pork consumption refers to brands with special quality characteristics.

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\(^{34}\) Not including bread spread (pålæg)
\(^{35}\) [http://www.statistikbanken.dk/OEKO3](http://www.statistikbanken.dk/OEKO3)
FOI Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter

Table 3.1. Market shares of different brands of pork

<table>
<thead>
<tr>
<th>Brand</th>
<th>Budget Share</th>
<th>Image and description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friland</td>
<td>4</td>
<td>Animal welfare and taste</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Free range or organic</td>
</tr>
<tr>
<td>Antonius/Vitalius</td>
<td>2</td>
<td>Animal welfare and/or taste</td>
</tr>
<tr>
<td>Crown of Cooking</td>
<td>0.5</td>
<td>Taste</td>
</tr>
<tr>
<td>The store's own brand</td>
<td>35</td>
<td>Standardised quality, often cheap</td>
</tr>
<tr>
<td>No information on brand in</td>
<td>58</td>
<td></td>
</tr>
</tbody>
</table>

Note: Data are only available for the last three quarters of 2004.

Sources: GfK, www.dma.dk, and www.crownofcooking.dk

Consumption categorized according to cuts

Figure 3.1 illustrates market shares (in quantities) for different cuts for 1997-2004. The most popular cut is minced pork. In 2004, 25% of pork consumption was minced (after a slightly decreasing trend). Around 15% of pork consumption is back while 10-15% is loin. Bacon and smoked pork both hold market share of 10% each. The categories tenderloin, neck, and ham all hold market shares of approximately 5%. Other represents a residual category of 10%. Market shares of different cuts are rather stable over time although small increasing trends can be observed for bacon and tenderloin while the domestic sales of ham drops from nearly 10% in 1998 to around 4% in 2002 and onwards.

Quantities and prices are typically believed to be inversely related such that small market shares are held by products with high prices. This picture is roughly the case for pork products (not illustrated graphically). Tenderloin was the most expensive cut with a price of DKK 65-90 per kg. The cheapest cuts include other, pork loin, and minced pork with prices of DKK 30-45 per kg. The ranking of prices for the different pork cuts appear to be quite stable (own calculations based on GfK).

36 Sausages have not been included as it was not possible to separate sausages containing pork meat from sausages made of e.g. beef or lamb.

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Consumption of minced pork categorized according to fat
There is a link between fat levels and Salmonella prevalence. More important however, fat level is an important factor from a nutritional aspect. Minced pork is marketed in four categories according to the content of fat. The market shares for different levels of fat in minced pork during the period 2001-2004 are shown in Figure 3.2.

Minced pork with a fat percentage less than or equal to 5 % has a market share around 5 % while the three groups with higher fat content each hold a market share of approximately 30 %. Looking at the results slightly differently, 40 % of the minced pork has a fat content below 10%.
Figure 3.2. Market share (in quantities) for four different levels of fat in minced pork, July 2001–March 2004

GfK also provides information concerning the prices paid for four different types of minced pork (Figure 3.3). A slightly decreasing trend in all prices is observed for the period 2001 to 2004 and price is negatively correlated with fat level. Thus, fat content below 5 % is the most expensive and costs DKK 40-50 per kilogram, closely followed by the categories 6-9% and 10-13% while there is a price span of at least 10 DKK down to fat level above 13 % fat.
3.2. Foreign Trade

More than 85% of pork produced in Denmark is exported and Denmark has the world’s largest export of pork (www.danishmeat.dk). According to Danish Meat Association (2008), the value of pork exports in 2007 constituted 5% of the total value of Danish exports and 50% of the agricultural exports. The export, import, and the trade balance for pork are shown in Figure 3.4 (measured in quantities).

The trade balance for pork is clearly dictated by the development in exports. The pork export has increased from 1.4 million tons of pork in 1997 to 1.8 million tons in 2005 (increase of 32%). The pork import is small compared to the export and has been increasing from 0.1 million tons in 1997 to 0.16 million tons in 2005.
Probably the most important aspect of foreign trade of pork in a safety perspective is the import share of human consumption. Due to difficulties in quantifying the extent of re-exports and non-edible by-products from imported pork, it is hard to obtain precise estimates of this import share, but it is considered that an import share in the area 20-25% constitutes a realistic order of magnitude (information is kindly provided by Jan Dahl and Karsten Fleming, Danish Meat Association, personal communication).

In Figure 3.5, pork import is divided into the categories chilled, frozen, ‘cured, dried, or smoked’, sausages, lard, by products, and live animals.

Figure 3.5 shows that the composition of pork import has changed over the period 1997-2005 (in value terms). The import of lard constituted a large share of the total import in the beginning of the period but has decreased drastically. Leaving lard out of the analysis, chilled and frozen pork have been the most important categories during the whole period with chilled pork covering 20-30% of pork import and frozen pork covering 15-25% of pork imports.
Figure 3.5. Danish pork import for 8 different product categories (in % of the value of pork import)

Source: Own aggregations based on DST4.

Figure 3.6 shows the imported quantity from the ten countries with the highest exports to Denmark.

Figure 3.6. The 10 largest exporters of pork to Denmark

Source: Own calculation based on DST4.

The majority of pork is imported from other EU countries with Germany being by far the largest single exporter of pork to Denmark. Note that some of the imported pork is...
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In fact, more than half of the Danish import of pork is imported from Germany followed by Sweden and the Netherlands that each accounted for around 10% of the Danish pork import. In 2005, the main part of the pork imports from Sweden consisted of lard. From 1997 to 2003 only an insignificant share of the pork imported to Denmark came from Poland. However in 2005, 10% of the import came from Poland, which was the only East-European country with any significant export to Denmark. The import from Poland is dominated by sausages and canned and prepared food, which together made up 79% of the Polish export to Denmark in 2005 (not illustrated graphically).

Export
Similarly, Figure 3.7 shows the composition of the Danish export (in value terms) of pork. The categories chilled and frozen, with shares of respectively 40% and 30%, are by far the largest export articles.

Figure 3.7. Danish pork export for 8 different product categories (in value terms)

Source: Own calculation based on DST4.

The share of the pork export sold as chilled has been increasing in the period 2001-2005 and in 2005 it made up 47% of the export. The share of frozen pork has been relatively stable, but decreased in 2005. The exports of processed meat have all been
steadily falling since 1997. Note also that the export of live animals has been increas-
ing the last years37.

Danish pork products are exported to a large range of countries. Approximately 70 %
is exported to other European countries (Danish Meat Association, 2008, p. 28). %). In 2005, the 10 largest export destinations covered 86 % of the total Danish pork ex-
port. The ten most important export markets for Danish pork in 1997-2005 are shown in Figure 3.8.

Figure 3.8. The 10 largest destinations for Danish pork export and their respective share of the total Danish export, 1997-2005 (in value terms)

Source DST4.

Germany was the largest buyer of Danish pork over the period with shares between 20 and 25 pct. of the pork export, closely followed by the United Kingdom (20 %) and Japan (15 %).

The shares of export to Germany have been increasing during the last years. Russia is the only country to which the export has declined steadily. Poland is a market that has developed fast in recent years. The trade with Poland is thus increasing as both the import and the export has increased considerably in 2005. Poland however, still im-

37 The dominating part of the exports of live pigs is sold in Germany (with shares of 83-96 pct of the export of live pigs). In earlier years the export was split evenly between slaughter pigs and piglets but in the last few years, the export of piglets has dominated.

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ports far more than it exports to Denmark. Moreover the export to China has increased steadily since 1997 but still constitutes a minor part of the export.

3.3. **Summary and discussion on pork**

Even though the Danish consumption of pork has been declining during the last decades, half of all the meat consumed in Denmark is still pork. In 2004, pork from non-conventional production systems had a market share of 6 – 7%. The sales of organic pork are increasing but still only constituted less than 1% of the pork consumption in 2004. From a zoonotic risk perspective, an increasing trend in organic pork consumption might be seen as a promising development as results indicate that pigs from outdoor productions tend to harbour at a lower prevalence than conventionally raised pigs. However, the safety implication of consumers’ brand choice is not clear. Also, quantitative differences in risk levels associated with different cuts are not clearly documented. The most popular category of pork cuts is minced meat accounting for 25% of pork consumption. The popularity of minced pork could possibly be of concern – all else equal – as it has been processed several times. Large price premiums were noted for low fat relative to high fat minced varieties which might indeed hamper the demand for low fat minced pork.

These market shares, confirmed by various consumer analyses (e.g. Lassen et al., 2002; Mørkbak, Christensen & Gyrd-Hansen, 2008a) suggest that consumers tend to focus more on fat content than on microbiological food safety and animal welfare. Hence, consumers’ involvement in safer food can be expected to be fairly low unless they are provoked by public market interventions or other factors that can affect preferences (as for example massive outbreaks of foodborne diseases).

The main trading partner for pork meat is Germany. The import of pork has increased over the period 1994-2005. A few years ago *Salmonella* occurred more often in imported pork than in Danish pork and was therefore likely associated with a higher risk, but recent results show that this difference has diminished which means that the risks from imported and Danish pork are likely to be rather similar (see Table 1.2).

Another type of risk associated with increased imports of pork exists because most other countries experience higher levels of anti-microbial resistance than Denmark.
Denmark has maintained its position as the world’s largest exporter of pork. Current trends in pork exports towards less processed products suggest that Danish export to an increasing extent faces international competition on prices and costs. From a regulatory perspective, interventions involving considerable costs for pork producers may impose a challenge in maintaining the current high level of exports.
Consumption patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter.
4. Chicken markets

The objective of Chapter 4 is to describe trends in the demand for chicken and to evaluate the role of these trends in a zoonotic risk context. In particular, we look deeper into patterns of chicken meat consumption (Section 4.1), foreign trade in chicken meat (Section 4.2) and we summarize and discuss the results in Section 4.3. A description of data can be found in Appendix F.

4.1. Consumption patterns

The following categorisations of chicken meat will be investigated: Production systems, convenience characteristics, processing characteristics, and trade. The categorizations are described in detail in Appendix F.

Consumption categorized according to production characteristics

The market share of organic chicken was less than 1% in the period 2001-2004 (own calculations based on GfK data and Baltzer (2002)). During the period, Danish organic chickens were mainly sold through farm shops and delivery routes, while Dansk Supermarked typically imported chilled organic chicken from France and COOP imported organic chicken from Germany.

According to Baltzer (2002), Campylobacter free, barn and organic jointly accounted for around 6% in 2000-2002 of chicken expenditures (see Table 4.1). It is apparent from Table 4.1 that a vast majority of the chicken market is held by conventional chicken. As indicated, around 94% of the chicken meat originates from conventional production systems.

One might expect the prices of these differentiated products (shown in the third column of Table 4.1) to depend on differences in production costs and differences in demand. The cheapest variety is the Campylobacter free chicken, which on average had a price of DKK 25/kg during the period 2000-2002. However, it is important to emphasize that each category includes several other qualities. Hence, the price of

38 Information is kindly provided by Helle Bossen, Organic Denmark, personal communication, 2006.
Campylobacter free chicken might be low because it is mainly sold as a whole chicken whereas conventional chicken meat are often more processed (hence, more expensive). The most expensive was the organic chicken with an average price of DKK 57/kg. An attempt to use the GfK data set to estimate price premiums for organic chicken during 2001 - 2004 resulted in price premiums from 0 to 26%. However, with a market share below 1 pct., the data from GfK contain a very limited number of organic purchases. As a consequence, the uncertainty of estimated price premiums is large.

<table>
<thead>
<tr>
<th>Category</th>
<th>Budget share in %</th>
<th>Price per Kg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conventional – not controlled for Campylobacter</td>
<td>94.0</td>
<td>43.29</td>
</tr>
<tr>
<td>Conventional - Campylobacter free</td>
<td>4.3</td>
<td>25.25</td>
</tr>
<tr>
<td>Barn</td>
<td>0.9</td>
<td>37.90</td>
</tr>
<tr>
<td>Organic</td>
<td>0.8</td>
<td>56.64</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: Baltzer (2002)

Baltzer (2002) finds that consumers substitute relatively easily between conventional Campylobacter-free chicken and conventional chicken that are not controlled for Campylobacter. Hence, if the price of conventional chicken drops against the price of Campylobacter-free chicken then consumers will increase consumption of conventional chicken at the expense of the Campylobacter-free variety. To the extent that market behaviour is able to capture consumers’ preferences, this suggests that consumers find the price more important than the Campylobacter-free attribute. Similarly, low market shares of organic chicken suggest that consumers also place more emphasis on the price than on organic attributes such as animal welfare and pesticide free feed.

Consumption categorized according to convenience characteristics
Market shares related to different levels of convenience are illustrated in Figure 4.1 for the period 2001-2004. Available categories in GfK data include breaded, marinated, precooked or smoked, and raw and other. The large majority (80%) of

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39 The potential market failures are described in Chapter 1.
40 Chilled chicken meat that is marinated with a mixture of water, salt and sugar ('neutralmarineret') is categorized as raw

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chicken for private consumption are sold as *raw and other*. Between 10 and 20% of the products are sold as *marinated*, whereas *breaded* and *precooked or smoked* items constitute very low shares. These shares have been stable over this four-year period.

**Figure 4.1. The market share (in quantities) for four convenience categories of chicken meat**

![Graph showing market share categories](image)

*Source: GfK data.*

**Consumption categorized according to processing characteristics**

Chicken consumption can also be categorised according to the four processing categories: *Frozen whole, chilled whole, frozen cut,* and *chilled cut,* market shares for the period 1997-2004 are shown in Figure 4.2. Chicken consumption has increased (by 22 %) and a shift from whole to cut/processed chicken.

Market investigations have shown that it is mainly busy families with children and young people that demand convenient processed chicken meat, whereas mainly elder consumers still demand whole chicken (Danish Poultry Council, 2005).
Figure 4.3 presents the price development during the period 1997-2004. The prices of frozen chicken (whole as well as cut), and chilled whole have been relatively stable over the period. A clear increase in price is seen for chilled cut chicken, especially since early 1999. The average price of chilled cut chicken has increased from 31.5 DKK/kg in 1997 to 54.5 DKK/kg in 2004. One explanation could be that the average quality of the chilled cut chicken has increased, e.g. that consumption has shifted from wings towards breast, or that there has been an increased demand for convenience properties of chilled cut chicken during the recent years which has driven up the price.
4.2. **Foreign Trade**

The trade balance, import and the export of chicken (meat and live fowls) are shown in Figure 4.4. Denmark is clearly a net-exporter of chicken but between 2002 and 2005, the net export has been decreasing.

Exports as well as imports of chicken have increased from 1997 to 2005. In 2005, almost 140 million kg of chicken was exported corresponding to a 20 % increase since 1997\(^{41}\). In the same period, chicken import increased from 20 million kg to 37 million kg corresponding to an increase of 85%.

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\(^{41}\) According to Danish Poultry Council (2008) p. 190, 19.7 million kg were export of live poultry fowls (hence, not only chicken, but chicken constitute the dominant part of the poultry production in Denmark).
Figure 4.4. Import, export, and trade balance for chicken (meat and live fowls) for the period 1997 – 2005 (in quantities)

Source: Own aggregations based on DST4.

Import
Møller et al. (2008, p. 10), estimate the imported share of Danish chicken meat consumption to be around 40%.

The composition of imported chicken meat has changed towards more processed meat (see Figure 4.5). In the late nineties, the import was dominated by whole frozen chicken. In 2005 the import was on the other hand clearly dominated by cut frozen, cut chilled, and conserved or cooked chicken, which all have experienced large growth rates.

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There have also been some shifts in the relative importance of the countries exporting chicken to Denmark, see Figure 4.6. Over the whole period (1997-2005), the majority of chicken meat is imported from Germany, the Netherlands, Sweden, and France. The last few years, Germany has been the largest contributor to Danish chicken import. Over the period, imports from Sweden and France have decreased and imports from the Netherlands and Germany have increased.

The imports from Brazil are remarkable because they in 2005 suddenly became the 5th largest exporter of chicken to Denmark. There seems to be an increasing number of countries exporting chicken to Denmark. In the period 1997-2002, Germany, Sweden, France and the Netherlands had 85-93 % of the Danish import market, but in 2005 this share had fallen to 72 % of the market. Important newcomers on the market are Brazil and Spain, but the market share of the group other has also been increasing.
Germany dominates the import market for *whole frozen, cut chilled*, and *cooked or conserved* chicken. The import from Sweden was in 2005 dominated by offal, while the Netherlands mainly exported various forms of processed chicken. In 2005, France supplied 84 % of the imported *whole chilled* chicken and 31 % of the *cut chilled* chicken. The overseas suppliers, Brazil and Thailand almost only supplied *cut frozen* and *conserved or cooked* chicken (based on DST4).

**Figure 4.6. The composition of the Danish chicken (meat and live fowls) import for the period 1997-2005**

![Chart showing the composition of Danish chicken import](image)

Source: Own aggregations based on DST4.

**Export**

Around 1/3 of the Danish poultry production are sold at the domestic market. ([www.danishmeat.dk/Forside/publikationer/nyhedsbrevet_danishmeat/2009](http://www.danishmeat.dk/Forside/publikationer/nyhedsbrevet_danishmeat/2009)). This leaves around 2/3 of the poultry production to be exported where 10 % of the production is exported alive and almost 60 % of the production is exported as meat (Danish Poultry Council, 2009, p. 190). Denmark exported around 60 % of the production in 2005 (own calculations based on Danish Poultry Council (2007, p. 104).

The processing and convenience characteristics of Danish chicken export are shown on Figure 4.7. The export is highly dominated by frozen products. Frozen products make up 90 million kg out of the total exported quantity of close to 140 million kg in 2005. A clear shift is seen from *whole chicken* towards more processed varieties as *cut frozen, cut chilled, and conserved or cooked*. 
Figure 4.7. Danish export of chicken for 7 different categories

Figure 4.8 illustrates the development in export destinations for Danish chicken from 1997 to 2005. During that period, Denmark mainly exports to Sweden, Germany, the UK as well as the United Arab emirates (U.A.E), Malaysia and Lithuania. Within the European market the export to especially Sweden has grown fast and in 2005 it was by far the most important single market for Danish chicken export, with a share of nearly 25%. The export to South Korea was nearly non-existent until 2004 where it increased to 15 % of the total quantity exported. Decreasing shares of export are sent to Germany, U.A.E., and the United Kingdom. According to Danish Poultry Council (2005), the export to the United Kingdom has declined due to competition among retail chains, which has led to increased pressure on the price.

Frozen chicken dominates the Danish exports, although the export share of prepared chicken meat is also increasing (from a very low level). The high emphasis on frozen products suggest a potential for expanding export to markets far from Denmark. At the same time, the growth in exports of processed chicken may suggest the development of more high-value markets for Danish chicken meat.
4.3. Summary and discussion on chicken

Chicken consumption increased by around 20% between 1997 and 2005. For private households, especially the consumption of cut and processed chicken has increased, while consumption of whole chicken has decreased.

The sale of conventional chicken clearly dominates the market. Less than 1% is sold as organic chicken in the period 1997-2004 and the Campylobacter free chicken was withdrawn from the market after low sales during the period 2000-2002. These market shares indicate that consumers tend to have higher priorities for price and convenience than for food safety, animal welfare and organic qualities when they buy chicken meat.

Imports increased significantly between 1997 and 2005 and mainly imports of processed chicken. Chicken is mainly imported from Germany but also the Netherlands, Sweden, France and Brazil are important contributors to Danish import of chicken meat. As these imports mainly origin from other European countries with higher risks concerning Salmonella, Campylobacter and antimicrobial resistance (except Sweden),

43 In 2008, Danpo sent 2 new products to the market: A Campylobacter free frozen chicken and an organic chicken produced in Denmark (www.danpo.dk).

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the increased imports of chilled chicken meat may give rise to concern from a food safety perspective (EFSA, 2007a, 2007b; Anonymous, 2006).

Denmark is also a large exporter of chicken and export increased during the period (1997-2005). Especially the export of processed frozen products have increased while whole frozen have decreased. The main markets for Danish chicken have shifted from the Middle East towards Europe. In 2005, Sweden was by far the most important single market for Danish chicken export. Due to the high export orientation of the Danish chicken sector, food safety-motivated interventions that involve costs for the sector may stimulate export possibilities to foreign markets with a high priority for safety but may hinder export possibilities to those who do not consider safety as an important characteristic. At the same time, food safety interventions in export oriented industries will to a large extent benefit non-Danish consumers.
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5. Egg market

Chapter 5 seeks to investigate trends in demand for eggs and egg and to evaluate whether these trends are supportive or destructive for reducing zoonotic risks in Denmark. Descriptions are provided for private consumption patterns (Section 5.1) and foreign trade (Section 5.2). Results are summarized and discussed (Section 5.3). Data are described in Appendix G.

5.1. Consumption patterns

Egg consumption (by private households and the industry) increased around 25 % between 1997 and 2006 (Section 2.3) – with private household consumption accounting for around 80 % (own calculations based on DST2).

*Consumption categorized according to production characteristics*

The market for table eggs distinguishes itself by 40 % of it being table eggs from non-standard productions. Figure 5.1 presents the market shares of table eggs sold through authorized retailers categorized according to production system (pasteurized eggs and non-authorized farm gate sale are not included). During the period 1997-2005, *battery eggs* are with a market share of nearly 60 % the dominating variety on the Danish retail table egg market, *barn eggs* have a market share of 20 %, 9-16 % of table eggs are *organic*, and eggs from *free range* hens have a market share of a little less than 10 %.

Figure 5.1 indicates that sales of eggs from different production systems have been rather stable, and only a small tendency of substitution away from battery eggs and free range towards barn and organic eggs can be detected. The small market share of free range eggs might be due to problems with distinguishing free range eggs from barn eggs (Baltzer, 2002).
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Figure 5.1. Market shares of table eggs from four different production systems, 1997-2005

![Bar chart showing market shares of table eggs from four different production systems, 1997-2005](chart)

Source: DVFA (2005).

Figure 5.2 uses GfK data to illustrate price premiums and market share for organic eggs in the period 1997-2004.

There is no clear link between price premiums and sales of organic eggs. The price premium for organic eggs (compared to a weighted average of the other types of eggs) has increased over the period from around 8% to around 12%. At the same time, the market share of organic eggs increased slightly from around 12% to 16%. According to GfK data used in Figure 5.2, organic eggs hold market shares between 12 and 21% for private consumption whereas using data from DVFA in Figure 5.1, organic market shares lie between 9 and 16% when industry consumption is included.
Consumption categorized according to processing characteristics

Figure 5.3 shows the share of pasteurized eggs relative to total quantity of eggs purchased by consumers between 1999 and 2004.

The egg market is heavily dominated by table eggs as the share of pasteurized eggs constitutes 1-4% of the total sale with an increasing tendency. The market share of pasteurized eggs fluctuates a lot over the year. There is a peak every year around December and January and during the summertime. It is thus clear that pasteurized eggs for a large part are used in seasonal dishes.

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44 The market for pasteurized eggs was kick started in 2000 because two persons died because they had eaten a cake made with raw eggs (Smed, 2002).
The prices for both pasteurized eggs and table eggs are shown on Figure 5.4. Data for pasteurized eggs are only available from 1999 to 2004 while data for table eggs exist for 1997 and 1998 as well. There is a considerable price premium for pasteurized eggs as price for the pasteurized variety is approximately DKK 2.5/egg and the price for table eggs is in the range DKK 1.3-1.6.
The slight increase in the price of table eggs might indicate increases in real prices or changes in composition of table eggs from battery eggs towards eggs from more animal-friendly production systems. The price of pasteurized eggs has had a more stable development, although there seems to have been a downward shift in the price and the price volatility in the second half of 2001. The average price premium on pasteurized eggs relative to table eggs has thus declined over the period, which all else equal should enhance consumers’ economic motives to extend their consumption of pasteurized eggs.

5.2. Foreign Trade

Trade balance

Denmark is a net-importer of eggs as can be seen in Figure 5.5. Between 1997 and 2002, net imports were around 10 million kg. Since 2002, net imports have increased to almost 30 million kg in 2005. The change in net trade is due to increased imports while exports have been rather stable.

![Figure 5.5. The import, export and trade balance for eggs](image)

Source: Own aggregations based on DST4.

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45 Pasteurized eggs are sold in small cups usually containing either two egg yolks or one and a half egg white. One cup is here defined as one egg.
Imports of eggs have increased between 1997 and 2005 (Figure 5.5). In Figure 5.6, the composition of Danish egg import according to processing characteristics is shown. As DST4 data are used, it is not possible to identify to what extent imports are re-exported. Imports of table eggs and egg products have increased while the import of eggs for hatching has been relatively stable at a low level. Imported eggs are mainly used by the industry but imported table eggs are also sold in Danish shops. According to DVFA (2006), the import of table eggs constituted 25-30 % of total consumption of table eggs but was hardly expected to contribute to human salmonellosis as the import was mainly for industrial purposes.

In Figure 5.7, Danish egg import is categorized according to country of origin during the period 1997 to 2005. The Netherlands was the largest exporter of eggs to Denmark in 2005 followed by Germany, Sweden, Belgium, Finland, and India (only dried egg). Based on preliminary data from the first 6 months of 2006, Poland experiences a fast growth on the Danish market.
Export
The overall level of export has been rather stable between 1997 and 2005 (Figure 5.5) but the composition has changed (Figure 5.8). From 1997 to 2000, table eggs dominated the Danish egg export. In 2001, there was a dramatic fall in the export of table eggs followed by increasing exports of eggs for hatching and egg products.
Even though export to Germany decreased during the period from 1997-2005, Germany was still the largest importer of Danish eggs, closely followed by the Netherlands and Sweden (although the export to Sweden has also fallen), see Figure 5.9. However, it is interesting to note that Poland started to import table eggs in 2006 and in the first 6 months in 2006 they were the largest importer of Danish table eggs (data for 2006 are not shown).

![Figure 5.9. The main importers of eggs from Denmark ranked according to size of import in 2005](image)

Source: Own calculations based on DST4.

*Foreign trade in organic eggs*

The import of organic eggs is very little. In 2004, the import only amounted to a value of 157,000 DKK and it was only from Nordic countries (DST4), which are known to have high food safety standards (Danish Poultry Council, 2005). Barn and free range eggs have almost not been imported by authorised Danish egg packers in the period 2000-2005 (DVFA, 2005). The export of organic eggs directly from authorized egg packers has however increased substantially since 2000. The export of organic eggs has risen from approximately 1 % in 2000 to approximately 9 % of the organic egg production in 2005 (own calculations based on DST2 and the DVFA, 2005). This estimate is probably a lower-end estimate of the total organic egg export, as it only covers export directly from egg packers.
5.3. **Summary and discussion on eggs**

The market for table eggs distinguishes itself by its large share of eggs from non-standard productions (barn, free range, and organic). In 2004, 40% of the table eggs were produced in non-standard productions. Since 1997, a large increase in the sale of organic eggs has been seen. The large market share for non-standard eggs indicates a large awareness among consumers for welfare among egg laying hens. No significant differences between Salmonella prevalence in flocks from different production systems have been found and there are no known differences in *Campylobacter* risks (these are generally considered to be low in eggs). Hence, there are no documented additional *Salmonella* or *Campylobacter* risks associated with the large market share of non-standard eggs.

Compared with the low Danish consumers’ preferences for safer meat products, the consumers tend to have a growing awareness of the potential food hazards related to eggs as indicated by the increasing (but still at a low level) demand for pasteurized eggs (4 % in 2004).

The import of eggs increased from 2002-2004 which could, potentially, pose increased food risk as *Salmonella* prevalence in eggs in other countries are typically significantly larger than in Denmark (eggs from e.g. Sweden constitute an exception). However, as the majority of imported eggs are used for egg products (e.g. cakes), the safety risks related to higher prevalence in imported eggs is substantially reduced (Table 1.2)\(^\text{46}\). Denmark expects to obtain special status in the EU for being able to ban eggs and chicken meat with a non-zero Salmonella risk\(^\text{47}\). In addition, at EU level there are restrictions on trade with eggs from *Salmonella typhimurium* or *Salmonella enteritidis* positive layer flocks – they can not be sold as eggs for private consumption\(^\text{48}\).

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\(^{46}\) Information is kindly provided by Peter Bertelsen, Danish Poultry Council, personal communication, 2006.

\(^{47}\) The application for eggs has been approved in EU and it is expected that it will be approved by WTO in the autumn 2009 (Press release May 19 2009, www.foedevarestyrelsen.dk/Nyheder/Nyheder/2009/saerstatus_salmonella_aeg ) while the application concerning chicken meat has not been processed in the EU yet.

\(^{48}\) See (EF) Nr. 1237/2007. Forordn. om ændring af Europa-Parlamentets og Rådets forordning (EF) nr. 2160/2003 og af Rådets beslutning 2006/696/EF for så vidt angår markedsføring af æg fra salmonellainficerede flokke af æglæggende høner. We want to thank Gudrun Sandøe, Danish Veterinary and Food Administration, for this reference.
The Danish egg market is more domestically oriented than the meat markets. Danish eggs (especially table eggs) hold a very strong market position on the domestic market. Eggs sold to Danish households are predominantly of domestic origin. Hence, in contrast to the situation for the pork and chicken sectors, food safety motivated policy interventions in the egg sector will to a large extent benefit the health of domestic consumers.
6. Conclusion and perspectives

Risk and consumption

Over the recent years, there have been twice as many cases of campylobacteriosis as of salmonellosis per year but at the same time salmonellosis have caused twice as many premature deaths as campylobacteriosis.

In 2007, one out of four cases of salmonellosis could be linked to food purchased in Denmark. Roughly similar shares of salmonellosis were linked to eggs, Danish meat, and imported meat, respectively. Additionally, one out of four cases of salmonellosis was registered as being acquired domestically but of unknown source. For campylobacteriosis, roughly two out of three cases were linked to food purchased in Denmark. The main sources of Salmonella infections are pork, poultry, and eggs while Campylobacter infections are mainly linked to poultry. Hence, it seems appropriate that policy measures to reduce zoonotic infections are targeted towards these markets.

At the same time, considerable shares of the zoonotic infections are likely to be linked to pork and poultry produced outside Denmark. Firstly, because one out of two cases of salmonellosis and one out of three cases of campylobacteriosis are estimated to be linked to travel. Secondly, import account for 20-25% of pork and 40% of chicken meat bought in Danish shops. In addition, 25-30% of eggs are imported – mainly for industrial use and therefore subject to heat treatment. So, even though the Danish pig and poultry sectors may appear to be straightforward objects for intervention, policy measures outside Denmark are also necessary for reducing zoonotic risks to Danish consumers.

Due to the Danish Salmonella source account system, it is possible to estimate the source in terms of type of animal product and place of origin for one out of two registered domestically acquired cases of Salmonella. Further improvement of the system as well as implementation of similar systems for Campylobacter would certainly increase the precision and validity of data that are used in political decisions. So would an increase in the precision of the registration rate. It is also worth mentioning that the present report has focused on prevalence of pathogenic bacteria. The number of Campylobacter and Salmonella bacteria in the meat is also extremely important for the risk of human illness. A systematic communication of the number of bacteria in dif-

\[49\] No detailed source accounts are available for Campylobacter. Hence, a division of cases from domestic versus imported food is not possible for campylobacteriosis.

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different types of meat and eggs would therefore shed valuable light on the links between risks in the product and human risks.

The *Salmonella* source account suggests that pork is linked to roughly twice as many human cases of salmonellosis as chicken \(^{50}\) (2005–2007 data). Can this difference in human incidence be directly linked to differences in the *Salmonella* prevalence between the two meat types? In order to address that question, we tried to address the human exposure by considering the differences in prevalence of *Salmonella* between imported and domestic meat, the proportion of imported meat for consumption, and the relative intake of pork and chicken meat. By adjusting for these factors, we predicted that pork should be responsible for two to five times as many human cases of salmonellosis as chicken meat \(^ {51}\). Despite a relatively large uncertainty, the result suggests that we should expect even more cases of salmonellosis from pork compared to chicken meat than estimated by the source account. Our calculations indicate the presence of product specific factors, not captured in the calculated exposure estimate, that influence the human incidence. In particular, we suggest that product specific factors such as specific characteristics of the food type \(^ {52}\), differences between handling and preparing chicken vs. pork, differences in the bacterial load in the meat, differences in the subtype distribution of *Salmonella* \(^ {53}\), differences in sampling methods and differences in how easy the bacteria are to sample – all these factors are worth looking into in order to improve our understanding of zoonotic risks related to fresh meat and its impact on human health.

\(^ {50}\) More precisely 1.7 = 7.8 %/4.5%

\(^ {51}\) *Using slaughter data for pork prevalens (1.1%):* Average prevalens in pork when adjusting for import: 4.1% = 0.75*1.1%+0.25*13.1% and in chicken meat 6.76% = 0.6*1.6 +0.4*14.5%. Increased risk when adjusting for differences in intake of pork and chicken meat: 1.8≈4.1%/6.76%*3. We have said that 1.8 ≈ 2.

*Using case-by-case data for pork prevalens (11.3%):* Average prevalens in pork when adjusting for import: 11.75% = 0.75*11.3%+0.25*13.1% and in chicken meat 6.76% = 0.6*1.6 +0.4*14.5%. Increased risk when adjusting for differences in intake of pork and chicken meat: 5.2≈11.75%/6.76%*3.

\(^ {52}\) Pork consumption might to a larger extend than chicken meat consumption be sold as ready-to-eat products with generally a low risk. This could drive some of the difference between the exposure estimate and the prevalence is of raw/fresh meat.

\(^ {53}\) Pires & Hald (forthcoming) found that by comparing Salmonella subtypes from humans with the distribution of the same subtypes in food-animal sources, the proportion of cases that can be attributed to each source can be estimated. In addition, they investigated the ability of different subtypes to result in reported human infections and of food sources to act as a vehicle for disease. They estimated the number of sporadic cases attributable to different *Salmonella* subtypes as a function of the prevalence of these subtypes in the animal-food sources, the amount of food consumed, subtype-related factors, and source-related factors.

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Egg contributes to a fair share of the *Salmonella* cases despite the fact that risks from domestic eggs are considered small. This suggests that consumers’ handling of eggs and (to the extent, that imported table eggs are sold in Danish shops), a higher *Salmonella* prevalence in imported table eggs might be risk factors that are worth looking into in relation to reducing the human cases of salmonellosis.

Campylobacteriosis is mainly linked to poultry meat, which covers 20 % of the overall meat consumption. At the same time, the number of cases of campylobacteriosis in recent years has been twice as high as the total number of *Salmonella* infections. Hence, *Campylobacter* in chicken might be considered to be the largest of the zoonotic hazard that we have looked at, that Danish consumers face presently.

A conclusion based on the situation in 2005-2007 suggests that chicken pose the largest bacterial problem, especially with respect to *Campylobacter*. *Salmonella* risks in Danish chicken are small but *Salmonella* risks in imported chicken are rather high. In addition, a large share of chicken has large numbers of *Campylobacter*. It is considered that none or hardly any *Campylobacter* risks are linked to pork and eggs.

The main picture of trade is that Denmark is a net-exporter of chicken and of pork and a net-importer of eggs (mainly for processing).

**Trends**

The high consumption of pork has a slightly decreasing trend whereas consumptions of eggs and (in particular) chicken meat have been increasing during the last 10-15 years.

The import share of chicken consumption in Denmark has been increasing during the last decade. As the prevalence of *Salmonella* and *Campylobacter* typically appear to be higher in the countries-of-origin of these imports, compared with domestic production, the increased import poses an additional food safety risk. As most of these imports come from EU member states, risks could potentially be reduced through common EU food safety standards.

Large – and increasing – shares of Danish pork and chicken production are exported. Hence, interventions to increase safety in the supply of these products may to a large extent result in improvements that will benefit consumers in export destination countries rather than the domestic consumers. This is a positive development from an
overall global perspective but it may pose a big challenge for the creation of national incentives to intervene. The vast majority of the Danish pork and chicken productions are exported to markets with high degree of price competition. This may make it difficult for producers to pass the increased costs on to consumers by increasing the sales price if consumers in those countries do not consider food safety as a product characteristic they are willing to pay a price premium for.

The average Danish household in 2005 spent 10 % on food out of their total expenditures compared to 13 % in 1990. And, compared with other European countries, the share of total budget allocated to food in Denmark seems to be below average. In addition, evidence from the present overview of Danish markets indicates that Danish consumers do not demonstrate high concern for microbiological food safety and their willingness to pay a higher price for safer products seems to be relatively low, compared to other product characteristics. These trends indicate that an average person in Denmark has a relatively low willingness to pay for safer food and for food in general.

The small market shares of safer food varieties indicate that consumers are not willing to pay for safety. To the extent that this is true, policy intervention leading to increased costs of domestic products might lead to reduced demand for these products and trigger an increase in the consumption of imported products – thereby possibly reducing the average level of food safety rather than increasing it. Such mechanisms should be taken into account in the scoping and design of new policy interventions. Research into these trends and into possibilities for changing perceptions and behaviour towards increased appreciations of safer products might be an instrument to increase market based food safety.

At the same time, Denmark has the world’s highest share of organic consumption (Willer & Yussefi 2007) – and recent growth rates in consumption indicate increased importance of the organic markets in the future. It should be kept in mind, though, that the vast majority of consumption still originates from conventional production. For example, 6 % of total food and beverages sold in Denmark in 2006 were organic (Denver et al., 2007). As an interesting annex, recent research indicates that organic consumers do not spend more money on food than non-organic consumers due to changes in the composition of their food consumption (Denver et al., 2007).

54 Followed by Switzerland, Germany, The US, Great Britain, and France.

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The importance of relations between risk and quality characteristics for the overall public health depends on how much consumers eat of the different types of meat and egg. The market shares for organic chicken meat and pork are very small (around 1% in 2004) whereas the market share for organic eggs was around 15% in 2004. For all categories, increasing market shares for the organic variety are observed. With respect to reducing *Salmonella* risks, this trend seems to be a good thing because the *Salmonella* prevalence tends to be lower in non-conventional pig herds than in conventional pig herds, no significant differences between *Salmonella* prevalences in egg layer flocks from different production systems have been found (and the prevalence is generally very low in egg layer flocks), and no differences between chicken meat from different production systems have been documented due to lack of data (but the prevalence is generally very low in conventional flocks). When the aim is to reduce *Campylobacter* risks, increased sales of organic chicken meat is a negative thing, increased sales of pork and eggs do not pose any known risks as there are no known differences in *Campylobacter* risks with respect to different production systems – and generally, the *Campylobacter* risks are considered to be neglectible in pork and eggs.

*Policy perspectives*

No single policy initiative can possibly incorporate all the above hazards and trends. As a consequence, we might suggest several policy initiatives that might reduce zoonotic risks. First, it could be made more attractive to buy goods with reduced zoonotic risks (stimulate demand). This could be done by making safer food relatively cheaper, through labelling, easier accessibility, etc. Second, consumers’ knowledge about zoonotic risks and how to avoid them could be increased (educate consumers). Third, knowledge about the sources of human infections could be increased (stimulate research). Fourth, the supply of safer food could be increased. This could be done by putting increased pressure on the Danish meat producers as well as putting increased pressure on countries that export meat to Denmark and countries that receive Danish travellers. In particular, as the safety level of Danish food production is relatively high by international standards, one appropriate target for policy interventions (which is already pursued) would be to further reduce the inflow foods with high prevalence of zoonoses or microbial resistance, e.g. import restrictions or bans. However, a more long sighted strategy might be to put pressure on other countries to reduce risks (stimulate the international political environment). The expected Danish achievement of an EU special status for eggs (with a zero tolerance) is a very recent example of how to use the international institutions to increase food safety. When considering such types of interventions, account should however be taken of international trade.
regulations, within the European Union as well as in the World Trade Organisation, that are formulated to avoid trade barriers.
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Appendix A. Methodology

The methodology of the present report is to use descriptive statistics. Specifically, market sizes and trends are described through various indicators of production, consumption, and international trade that have been selected according to their relevance and availability. Arguments for inclusion of the indicators are shortly presented below.

Production
A description of food production is relevant in order to address the potential domestic sources of zoonoses in foods, as well as for determining an order of magnitude against which the costs of e.g. food safety motivated policy interventions could be assessed. Two types of indicators are used in the description of Danish production, both addressing the output value of the Danish food industry.

- The absolute output value of the Danish food and beverage industry, measured in 2000 price level, provides an indication of the absolute magnitude of this industry. In addition, the development in fixed-price output value of the food and beverage industry over time can be interpreted as an aggregate index of produced quantity from this industry.
- Dividing the food and beverage industry output value by the national aggregate output value yields a relative output value, which represents the economic significance of the food and beverage industry in a macro-economic context.

Consumption
A description of food consumption patterns is important for identifying the possible sources of zoonotic infections. Furthermore, the efficiency and economic consequences of policy actions to improve microbiological food safety depend consumption patterns and expenditures have roles to play regarding the. Three types of consumption indicators are used in the descriptive analysis.

- The total food and beverage consumption expenditure provides an order of magnitude regarding the economic importance of food consumption, and hence an economic reference for measuring consumer-related costs of food safety interventions. In addition, the fixed-price development in food and
beverage consumption expenditure over time can be interpreted as an aggregate quantity index of food and beverage consumption.

- Another quantity indicator is the consumed physical quantity of selected foods. This indicator is more suitable when aggregating relatively homogeneous types of foods, e.g., different types of meat. Physical quantities are measured in aggregate figures as well as in per capita figures.
- When addressing the importance of special quality varieties (e.g., organic, free-range) on the market, we use the market share of specific qualities (e.g., organic eggs’ share of total eggs’ sales) measured as expenditure shares as an indicator. This indicator represents the consumers’ allocation of the consumption budget towards such quality varieties and hence reflects their priorities. On the other hand, as the prices may differ across quality varieties, such market shares can normally not be interpreted directly as quantity shares of the market.

**International trade**

International trade plays an important role regarding food safety interventions in domestic supply. On the one hand, the content of pathogens in imported food products is not affected by policy measures addressing domestic production. On the other hand, pathogen reductions in products that are exported do not directly benefit domestic consumers. Three types of indicators are used to describe food trade.

- The trade balance in selected food categories measured in monetary terms indicates the extent to which Denmark has a net inflow or net outflow of the respective food types – or of food in general. For specific product categories, the import quantities illustrate the extent to which domestic consumers are exposed to imported foods versus domestically produced foods.
- On the other hand, export quantities describe the extent to which benefits from safety improvements in domestic food production is exported.
- As the prevalence and types of different zoonoses may vary according to product type and country of origin, the report includes indicators of the distribution of imports and exports on product type and country of origin/destination.

**Prices and price premiums**

Prices reflect information about supply costs as well consumers’ demand and hence willingness to pay for commodities. In the present context, this is especially relevant

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when comparing different quality varieties of food products, for example the extent to which food products with certain attributes can be marketed and sold a higher price than without these attributes. This aspect is represented by two types of indicators:

- *absolute prices* and their development over time, and
- price premiums for certain quality varieties.
Appendix B. An overview of data sources

The report builds mainly on publicly available data related to the Danish food markets including data from the national statistical bureau (Statistics Denmark, DST), an extensive panel dataset on household consumption from the market analysis company GfK, as well as yearly statistics from Danish Poultry Council, Danish Veterinary and Food Administration, and Eurostat. An overview of the data sources used is given in Table B.1 followed by a description of the individual data sources.
### Table B.1. Data sources

<table>
<thead>
<tr>
<th>Data source</th>
<th>Period</th>
<th>Comments</th>
<th>Used for chapter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agricultural Statistics (DST2)</td>
<td>1990-2007</td>
<td>Production and consumption data All measured in quantities. Productions of pork and chicken refer to slaughtered weight. Consumption data includes private and industrial consumption.</td>
<td>2, 3, 5</td>
</tr>
<tr>
<td>Foreign trade, main categories (DST3)</td>
<td>1990-2006</td>
<td>Measured in quantities. Includes main categories of foreign trade. Broader categories than DST1 and DST2 Distinguishes between organic/not organic.</td>
<td>2</td>
</tr>
<tr>
<td>Foreign trade detailed categories (DST4)</td>
<td>1997-2006</td>
<td>Only quantity measures are used. Detailed description of foreign trade.</td>
<td>3, 4, 5</td>
</tr>
<tr>
<td>GfK</td>
<td>1997-2004</td>
<td>Measured in volume and value Panel data on household consumption. Detailed description.</td>
<td>3, 4, 5</td>
</tr>
<tr>
<td>Danish Poultry Council</td>
<td>1999-2005</td>
<td>Measured in quantities Detailed data based on reports from chicken abattoirs Distinguishes between chicken /other poultry and identifies domestic production, domestic stocks, sale for home market and export..</td>
<td>4</td>
</tr>
<tr>
<td>The Danish Veterinary and Food Administration</td>
<td>1997-2005</td>
<td>Data on egg turn over based on reports from egg packing companies</td>
<td>5</td>
</tr>
<tr>
<td>Eurostat</td>
<td>1990-2005</td>
<td>Pan-European data on food consumption</td>
<td>2</td>
</tr>
</tbody>
</table>

**Statistics Denmark (DST)**

DST provides several statistics. For the present purpose, data have been drawn from the national account statistics (DST1), the agricultural statistics (DST2), and the foreign trade statistics (DST3 and DST4). National account data (DST1) are used in Chapter 2 to give an overview of the food and beverage market, including data on production, consumption and foreign trade for the period 1990-2005. In addition,

55 Source: oral communication with Ole Nielsen (2006) and www.statistikbanken.dk.

Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter.
DST1 provide information about consumption of individual meat categories for the period 1990-2002. Agricultural statistics data (DST2) provide information about consumption and production of various animal products (measured in quantities) for the period 1990-2002. Data on trade with food and beverages in general is provided by (DST3) for the period 1990-2005 while detailed data on trade with different types of pork, chicken and eggs is found in DST4 for the period 1997-2005. Note that the foreign trade statistics has a 2 year lack in the final approval of data. Therefore, data from 2004 and 2005 are preliminary data.

United Nations standard international trade classification (SITC) is used for the description of foreign trade. The definition of food in SITC includes both products for human and animal consumption (United Nations Statistics Division’s website, 2006).56

The GfK Consumer Scan household panel dataset
GfK household consumption data are more detailed than data from Statistics Denmark with respect to the different types of the products pork, chicken and eggs that are purchased. Furthermore, GfK data include only private households’ consumption. GfK panel data from the Consumer Scan panel are used in the detailed analyses of pork, chicken, and egg consumption. The GfK data are based on approximately 2000 households. On a weekly basis, all households report their purchases of groceries, including food. The households keep a diary, where they for all grocery groups (among other commodity groups) note:
- Quantity (number or gram)
- Price (DKK)
- Brand
- Type (e.g. frozen or fresh)
- Place of purchase (e.g. Netto)
- Variant size (e.g. 20 piece package)
- On offer/not on offer

The available GfK data are available for 2001-2004, and hence does not include the most recent developments in food consumption at the household level. The likely importance of this will be discussed in relation to the individual results in the following chapters.

56 For example, the category food in the present analysis does not include the category ‘group 08: Feeding stuff for animals (less un-milled cereal)’ while beverages oppositely has been added.
Danish Poultry Council (Det danske fjerkæråd)
Danish Poultry Council publishes statistics based on reports from the Danish chicken abattoirs, where the total sale of chicken from the abattoirs is registered. Both private and industry consumptions are thus included. The statistic distinguishes itself from Statistics Denmark by registration of chicken separately from other poultry and by registration of sale for the Danish home market. Data for the period 1990-2005 are used.

The Danish Veterinary and Food Administration
The Danish Veterinary and Food Administration provides a number of statistics. In the present analyses, registrations of the turnover of eggs for all egg-packing companies for the period 1990-2005 have been used. These statistics include quality of eggs, whether the eggs are graded or not, place of origin, and to whom they are sold - all of which are registered on a quarterly basis.

Eurostat
The European statistical office (Eurostat) provides comparable statistics for the EU member states. Data for the period 1990-2005 from Eurostat are used for comparing Danish figures with data from similar countries.
Appendix C. Categories in Statistics Denmark

**DST1**

Description of the categories based on the database that we denote DST1 that are used to describe production and consumption. The figures are drawn from the National Account statistics:

- **NAT05**: Private consumption (DKK mill.) by classification of individual consumption and price unit
- **NAT07**: Production etc. (DKK mill.) by kind of activity, variable and price unit

### Table C.1. Description of categories based on DST1

<table>
<thead>
<tr>
<th>Our categories</th>
<th>Production</th>
<th>Classification in DST1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food and beverage</strong></td>
<td>1509 Mfr. of food, beverages and tobacco (tobacco subtracted)</td>
<td>The sum of this column</td>
</tr>
<tr>
<td><strong>Meat</strong></td>
<td>151000 Production etc. of meat and meat products</td>
<td>1120 Meat</td>
</tr>
<tr>
<td><strong>Fish</strong></td>
<td>152000 Processing and preserving of fish and fish products</td>
<td>1130 Fish</td>
</tr>
<tr>
<td><strong>Fruit and vegetables</strong></td>
<td>153000 Processing and preserving of fruit and vegetables</td>
<td>1160 Fruit and vegetables except potatoes 1171 Potatoes etc.</td>
</tr>
<tr>
<td><strong>Dairy</strong></td>
<td>155000 Mfr. of dairy products</td>
<td>1142 Milk, cream, yoghurt etc. 1143 Cheese 1150 Butter, oils, and fat</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>158109 Mfr. of bread, cakes and biscuits 158120 Bakers shops 158300 Manufactures of sugar 156009 Mfr. of starch, chocolate and sugar products (incl. mfr. eggs) 154000 Mfr. of vegetable and animal oils and fats</td>
<td>1110 Bread and cereals 1181 Sugar 1182 Ice cream, chocolate and confectionery 1190 Food products n.e.c.</td>
</tr>
<tr>
<td><strong>Beverage</strong></td>
<td>159000 Manufactures of beverages</td>
<td>120 Non-alcoholic beverages 210 Alcoholic beverages</td>
</tr>
<tr>
<td><strong>Eggs</strong></td>
<td>1141 Eggs</td>
<td></td>
</tr>
</tbody>
</table>

57 "Statistikbanken” under the sub-category "Nationalregnskab, betalings- og kapitalbalance” and "afsluttede serier”.
58 "NAT07X: Produktion mv. (mio.kr) efter branche, anvendelsesident og prisenhed”.
59 "NAT05X: ENS95 – Privatforbrug (mio.kr) efter forbrugergruppe og prisenhed “.

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DST2
The list below describes the aggregated categories in the report that are based on the database that we denote DST2. The data are used to describe consumption of meat. The figures are drawn from statistics for Agriculture, consumption of foodstuffs FVF 1 Human consumption of food by type and unit (per year)\(^60\). The categories cover “meat available for private and industrial consumption” and they are measured in million kilos.

<table>
<thead>
<tr>
<th>Our Categories</th>
<th>Classification in DST2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meat total</td>
<td>Meat, total</td>
</tr>
<tr>
<td>Beef</td>
<td>Beef and veal</td>
</tr>
<tr>
<td></td>
<td>Edible offals of cattle</td>
</tr>
<tr>
<td>Pork</td>
<td>Pig meat</td>
</tr>
<tr>
<td></td>
<td>Edible offals of pigs</td>
</tr>
<tr>
<td>Poultry</td>
<td>Poultry meat</td>
</tr>
<tr>
<td>Other</td>
<td>Horse meat</td>
</tr>
<tr>
<td></td>
<td>Mutton and lamb</td>
</tr>
<tr>
<td></td>
<td>Game meat</td>
</tr>
<tr>
<td>Eggs</td>
<td>Eggs, total</td>
</tr>
</tbody>
</table>

DST3
The table below contains a description of the aggregated categories in the report that are based on the database that we denote DST3. Figures are drawn from the following statistics describing external trade\(^61\):

- SITC5R3Y: Im- and export (rev.3) according to import and export, SITC- main categories, country and unit’

\(^60\) ”Statistikbanken” under ”Landbrug/Fødevareforbrug” and the sub-category ”FVF1: Fødevareforbrug efter type og enhed og (år)”.

\(^61\) ”Statistikbanken” under ”Udenrigshandel” and sub-category ”SITC5R3Y: Im- eksport efter im-og eksport, SITC hovedgrupper, land og enhed”.

Consumptions patterns and consumer risks – an overview of the Danish markets for pork, chicken, and eggs and the consumer risk associated with Salmonella and Campylobacter
### Table C.3. Description of categories based on DST3

<table>
<thead>
<tr>
<th>Categories</th>
<th>Classification in DST3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and beverage</td>
<td>The sum of this column</td>
</tr>
<tr>
<td>Meat</td>
<td>00 Live animals (except fish, crustaceans, molluscs and aquatic invertebrates)</td>
</tr>
<tr>
<td></td>
<td>01 Meat and meat preparations</td>
</tr>
<tr>
<td>Fish</td>
<td>03 Fish (Not marine mammals), crustaceans, molluscs and aquatic invertebrates, and preparations thereof</td>
</tr>
<tr>
<td>Fruit and vegetables</td>
<td>05 Vegetables and fruit</td>
</tr>
<tr>
<td>Dairy</td>
<td>02 Dairy products and birds eggs</td>
</tr>
<tr>
<td>Flour, bread, sugar, and other</td>
<td>09 Miscellaneous edible products and preparations</td>
</tr>
<tr>
<td></td>
<td>06 Sugars, sugar preparations and honey</td>
</tr>
<tr>
<td></td>
<td>07 Coffee, tea, cocoa, spices and manufactures thereof</td>
</tr>
<tr>
<td></td>
<td>04 Cereals and cereal preparations</td>
</tr>
<tr>
<td>Beverage</td>
<td>11 Beverages</td>
</tr>
</tbody>
</table>

### DST4

The table below contains a description of the aggregated categories in the report that are based on the database that we denote DST4. All figures for pork, poultry, and eggs, respectively are drawn from the statistics describing external trade at a detailed level: KN8A: Imports and exports by imports and exports, commodities, country and unit.\(^{62}\)

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\(^{62}\) Statistikbanken under udenrigshandel/detaljeret udenrigshandel og underkategori KN8Y: Im- og eksport KN (Kombineret nomenclatur) efter im- og eksport, varer, land og enhed
### Table C.4. Pork categories based on DST4

<table>
<thead>
<tr>
<th>Our categories</th>
<th>Classification in EU Combined Nomenclature. DST4</th>
</tr>
</thead>
</table>
| **Live**       | Domestic swine, weighing < 50 kg (excl. pure-bred for breeding)  
Live domestic sows, having farrowed at least once, weighing >= 160 kg (excl. pure-bred for breeding)  
Live domestic swine, weighing >= 50 kg (excl. sows having farrowed at least once and weighing >= 160kg) |
| **Chilled Meat** | Fresh or chilled domestic swine carcases and half-carcases  
Fresh or chilled with bone in, domestic swine hams and cuts thereof  
Fresh or chilled with bone in, domestic swine shoulders and cuts thereof  
Fresh or chilled fore-ends and cuts thereof of domestic swine  
Fresh or chilled loins and cuts thereof of domestic swine  
Fresh or chilled bellies streaky and cuts thereof of domestic swine  
Fresh or chilled boneless meat of domestic swine (excl. bellies and cuts thereof)  
Fresh or chilled boneless meat of domestic swine (excl. carcases and half-carcases, hams, shoulders)  
Fresh or chilled edible livers of domestic swine (excl. for manufacture of pharmaceutical products)  
Fresh or chilled edible domestic swine offal (excl. livers)  
Fresh or chilled edible domestic swine offal (excl. livers and offal for manufacture of pharmaceutical products)  
Frozen edible offal of domestic swine (excl. livers)  
Fresh, chilled or frozen subcutaneous pig fat, salted or in brine |
| **Frozen Meat** | Frozen domestic swine carcases and half-carcases  
Frozen boneless hams and cuts thereof of domestic swine  
Frozen boneless shoulders and cuts thereof of domestic swine  
Frozen fore-ends and cuts thereof of domestic swine  
Frozen loins and cuts thereof of domestic swine, with bone in  
Frozen bellies streaky and cuts thereof of domestic swine  
Frozen boneless meat of domestic swine, with bone in (excl. carcases and half-carcases, hams, shoulders) |
| **Cured, dried or smoked** | Dried or smoked subcutaneous pig fat  
Dried or smoked domestic swine hams and cuts thereof, salted or in brine, with bone in  
Domestic swine shoulders and cuts thereof, salted or in brine, with bone in  
Domestic swine hams and cuts thereof, dried or smoked, with bone in  
Domestic swine shoulders and cuts thereof, dried or smoked, with bone in  
Bellies streaky and cuts thereof of domestic swine, salted or in brine  
Bellies streaky and cuts thereof of domestic swine, dried or smoked  
Bacon sides or spencers of domestic swine, salted or in brine  
Three-quarter-sides or middles of domestic swine, salted or in brine  
Loins and cuts thereof of domestic swine, salted or in brine  
Meat of domestic swine, salted or in brine (excl. hams, shoulders and cuts thereof, bellies and cuts thereof)  
Boneless meat of domestic swine, salted or in brine (excl. bellies and cuts thereof)  
Meat of domestic swine, salted or in brine, with bone in (excl. hams, shoulders and cuts thereof, bellies and cuts thereof)  
Domestic swine fore-ends and cuts thereof, dried or smoked  
Domestic swine loins and cuts thereof, dried or smoked  
Dried or smoked boneless domestic swine meat (excl. bellies and cuts thereof)  
Dried or smoked domestic swine meat, with bone in (excl. hams, shoulders and cuts thereof, bellies and cuts thereof) |
### Table C.4. Pork categories based on DST4

<table>
<thead>
<tr>
<th>Our categories</th>
<th>Classification in EU Combined Nomenclature. DST4</th>
</tr>
</thead>
</table>
| Canned food and prepared food | Hams and cuts thereof, of domestic swine, prepared or preserved  
Prepared or preserved shoulders and cuts thereof, of domestic swine  
Prepared or preserved domestic swine loins and parts thereof, incl. mixtures of loins or hams (excl collars)  
Prepared or preserved domestic swine collars and parts thereof, incl. mixtures of collars and shoulders  
Prepared or preserved mixtures of domestic swine hams, shoulders, loins, collars and parts thereof  
Meat or offal, incl. mixtures, of domestic swine, prepared or preserved, containing, by weight, >= 80% meat  
Prepared or preserved meat, offal and mixtures, of domestic swine, containing >= 40% but < 80% meat  
Prepared or preserved meat, offal and mixtures of domestic swine containing < 40% meat or offal of domestic swine  
Prepared or preserved meat or meat offal containing meat or offal of domestic swine (excl. of poultry)  
Pasta, stuffed with meat or other substances, whether or not cooked or otherwise prepared, containing > 20% sausages or the like of meat or offal |
| Sausages                     | Uncooked sausages of meat, offal or blood (excl. liver)  
Sausages and similar products of meat, offal or blood and food preparations based thereon (excl. liver) |
| Lard                         | Pig fat, not rendered or otherwise extracted  
Pig fat, incl. lard, rendered or otherwise extracted (excl. for technical/industrial uses) |
| By-products                  | 02064100 (sum of the 6 rows below)  
Frozen edible swine livers for manufacture of pharmaceutical products  
Frozen edible livers of domestic swine  
Frozen edible livers of domestic swine (excl. for manufacture of pharmaceutical products)  
Frozen edible swine offal for manufacture of pharmaceutical products (excl. livers)  
Frozen edible offal of domestic swine (excl. livers)*  
Frozen edible offal of domestic swine (excl. livers and offal for manufacture of pharmaceutical products)  
Edible domestic swine livers, salted, in brine, dried or smoked  
Edible domestic swine offal, salted, in brine, dried or smoked (excl. livers)  
Liver sausages and similar products and food preparations based thereon  
Homogenised prepared meat, offal or blood, put up for retail sale as infant food or for dietetic purposes  
Preparations of liver (excl. sausages and similar products, finely homogenised preparations put up) |

*) 50% of these categories are included here.
**Table C.5. Chicken categories based on DST4**

<table>
<thead>
<tr>
<th>Our categories</th>
<th>Classification in EU Combined Nomenclature. DST4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole Fresh</td>
<td>Fresh or chilled, plucked and gutted fowls of species Gallus domesticus, with heads and feet, known</td>
</tr>
<tr>
<td></td>
<td>Fresh or chilled, plucked and drawn fowls of species Gallus domesticus, without heads and feet but with necks, hearts and livers</td>
</tr>
<tr>
<td></td>
<td>Fresh or chilled, plucked and drawn fowls of species Gallus domesticus, with heads, feet, necks, hearts or livers</td>
</tr>
<tr>
<td>Whole Frozen</td>
<td>Frozen fowls of species Gallus domesticus, plucked and drawn, without heads and feet but with necks, hearts and livers</td>
</tr>
<tr>
<td>Cut Fresh</td>
<td>Fresh or chilled boneless cuts of fowls of the species Gallus domesticus</td>
</tr>
<tr>
<td></td>
<td>Fresh or chilled halves or quarters of fowls of the species Gallus domesticus</td>
</tr>
<tr>
<td></td>
<td>Fresh or chilled breasts and cuts thereof of fowls of the species Gallus domesticus, with bone in</td>
</tr>
<tr>
<td></td>
<td>Fresh or chilled legs and cuts thereof of fowls of the species Gallus domesticus, with bone in (excl. halves and quarters)</td>
</tr>
<tr>
<td>Cut Frozen</td>
<td>Frozen boneless cuts of fowls of the species Gallus domesticus</td>
</tr>
<tr>
<td></td>
<td>Frozen halves or quarters of fowls of the species Gallus domesticus</td>
</tr>
<tr>
<td></td>
<td>Frozen breasts and cuts thereof of fowls of the species Gallus domesticus, with bone in</td>
</tr>
<tr>
<td></td>
<td>Frozen legs and cuts thereof of fowls of the species Gallus domesticus, with bone in (excl. halves or quarters, whole)</td>
</tr>
<tr>
<td>Cooked or</td>
<td>Uncooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing &gt;= 57% meat or meat offal</td>
</tr>
<tr>
<td>conserved</td>
<td>Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing &gt;= 57% meat or meat offal</td>
</tr>
<tr>
<td></td>
<td>Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing &gt;= 25% and &lt; 57% meat or meat offal</td>
</tr>
<tr>
<td></td>
<td>Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus (excl. that containing &gt;= 25% meat or meat offal)</td>
</tr>
<tr>
<td>Other</td>
<td>Fresh or chilled whole wings, with or without tips, of fowls of the species Gallus domesticus</td>
</tr>
<tr>
<td></td>
<td>Fresh or chilled backs, necks, backs with necks attached, rumps and wing-tips of fowls of the species Gallus domesticus</td>
</tr>
<tr>
<td></td>
<td>Fresh or chilled edible livers of fowls of the species Gallus domesticus</td>
</tr>
<tr>
<td></td>
<td>Frozen whole wings, with or without tips, of fowls of the species Gallus domesticus (excl. livers)</td>
</tr>
<tr>
<td></td>
<td>Frozen backs, necks, backs with necks attached, rumps and wing-tips of fowls of the species Gallus</td>
</tr>
<tr>
<td></td>
<td>Frozen edible livers of fowls of the species Gallus domesticus</td>
</tr>
<tr>
<td></td>
<td>Frozen edible offal of fowls of the species Gallus domesticus (excl. livers)</td>
</tr>
<tr>
<td></td>
<td>Live fowls of the species Gallus domesticus, weighing &gt; 185 g but &lt;= 2 kg (Live animals)</td>
</tr>
<tr>
<td></td>
<td>Live fowls of the species Gallus domesticus, weighing &gt; 2 kg</td>
</tr>
<tr>
<td>Our categories</td>
<td>Classification in EU Combined Nomenclature. DST4</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Eggs for hatching</td>
<td>Turkey or goose eggs for hatching</td>
</tr>
<tr>
<td></td>
<td>Poultry eggs for hatching (excl. turkey or goose)</td>
</tr>
<tr>
<td>Shell eggs</td>
<td>Poultry eggs, in shell, fresh, preserved or cooked (excl. for hatching)</td>
</tr>
<tr>
<td>Egg products</td>
<td>Egg yolks, dried, for human consumption, whether or not containing added sugar or other sweetening</td>
</tr>
<tr>
<td></td>
<td>Egg yolks, liquid, suitable for human consumption, whether or not containing added sugar or other sweetening</td>
</tr>
<tr>
<td></td>
<td>Egg yolks (other than liquid), frozen or otherwise preserved, suitable for human consumption, whether or not containing added sugar or other sweetening</td>
</tr>
<tr>
<td></td>
<td>Dried birds eggs, not in shell, whether or not containing added sugar or other sweetening matter, suitable for human consumption</td>
</tr>
<tr>
<td></td>
<td>Birds eggs, not in shell, fresh, cooked by steaming or by boiling in water, moulded, frozen or other except dried, suitable for human consumption</td>
</tr>
<tr>
<td></td>
<td>Egg albumin, dried e.g. in sheets, scales, flakes, powder, fit for human consumption</td>
</tr>
</tbody>
</table>
|                       | Egg albumin, fit for human consumption (excl. dried [e.g. in sheets, flakes, crystals, powder])
Appendix D. Description of data used in Chapter 2

Appendix table D provides an overview over the data sources used to describe production, consumption, and foreign trade of food and beverages in Chapter 2.

<table>
<thead>
<tr>
<th>Description of Characteristics</th>
<th>Source</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall production of food and beverages for private household consumption and for industrial consumption</td>
<td>DST1</td>
<td>1990-2004</td>
</tr>
<tr>
<td>Production of 6 different categories of food and beverages</td>
<td>DST1</td>
<td>1990-2004</td>
</tr>
<tr>
<td>Private households’ expenditures on food and beverages</td>
<td>DST1</td>
<td>1990-2006</td>
</tr>
<tr>
<td>Private households’ expenditures on 8 different categories of food and beverages (measured in DDK)</td>
<td>DST2</td>
<td>1990-2006</td>
</tr>
<tr>
<td>Private household and industrial consumption of 4 different meat categories (measured in kg)</td>
<td>DST2</td>
<td>1990-2007</td>
</tr>
<tr>
<td>International comparison of food consumption expenditure</td>
<td>Eurostat</td>
<td>1994-2005</td>
</tr>
<tr>
<td>International comparison of meat consumption per capita</td>
<td>Eurostat</td>
<td>1990-2005</td>
</tr>
<tr>
<td>Aggregate of shell and processed eggs</td>
<td>DST2</td>
<td>1997-2007</td>
</tr>
<tr>
<td>Total import and export of food and beverages</td>
<td>DST3</td>
<td>1990-2006</td>
</tr>
<tr>
<td></td>
<td>DST4</td>
<td></td>
</tr>
</tbody>
</table>

In DST, the food industry is defined as ‘companies processing products from agriculture and fisheries into food and fodder for respectively human beings and animals’. In particular, to qualify as a ‘food industry’ firm, it has to engage in a certain degree of processing. For example, values created by bakers are included because material is converted into new products, while butchers and fishmongers are not included as they do not convert material. Similarly, firms that process eggs are categorized as ‘food industry’ firms while firms selling shell eggs are not included (DST, 2002). Semi-manufactured articles, which can not be used for food or fodder (for example hides, feathers etc. from abattoirs) are included in DST’s definition of food industry. Tobacco is not included as food or beverages. The description of sub-categories of production and consumption is only provided for the period 1990-2004 as detailed data are only released with some delay from DST (oral communication with Bo Siemsen, 63 This definition is from the Danish industrial classification – DB03, which also is used by DST in the national account (oral communication with Bo Siemsen DST).

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The classifications of food categories vary across data sources. For example, in the description of consumption, meat consumption covers meat for private household consumption only but in the description of production, meat covers meat produced for private consumption and for industries. Finally, in the description of foreign trade, meat consumption includes meat for private consumption as well as meat and live animals consumed by the industry.
Appendix E. Description of data used in Chapter 3 (pork)

<table>
<thead>
<tr>
<th>Description of</th>
<th>Characteristics</th>
<th>Categories</th>
<th>Source</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production system</td>
<td>Conventional, free range, organic</td>
<td>GfK</td>
<td>1997-2004</td>
<td></td>
</tr>
<tr>
<td>Consumption Patterns</td>
<td>9 categories: Back, bacon, ham, minced, neck, pork loin, smoked, tenderloin, other</td>
<td>GfK</td>
<td>1997-2004</td>
<td></td>
</tr>
<tr>
<td>Processing</td>
<td>Fat content in minced pork</td>
<td>&lt;6%, 6-9%, 10-12%, &gt;13%</td>
<td>2001-2004</td>
<td></td>
</tr>
<tr>
<td>Processing</td>
<td>7 categories: Fresh meat; frozen meat; cured, dried or smoked; canned and prepared food; sausages; lard; by-products; live</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foreign trade</td>
<td>Trading partners, Import</td>
<td>Germany, United Kingdom, Japan, Italy, Russia, Poland, Sweden, Netherlands, USA, China</td>
<td>DST4</td>
<td>1997-2005</td>
</tr>
<tr>
<td></td>
<td>Trading partners, Export</td>
<td>Germany, Sweden, Netherlands, Poland, Spain, France, Belgium, United Kingdom, Ireland, Italy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The descriptions of domestic consumption and foreign trade are not easily comparable as they are based on GfK data and DST4 data, respectively. The GfK data only cover private household consumption, whereas DST4 data covers both private and industrial consumption. This leads to large differences for categories where industrial consumption is large. Also, the categorisation of goods differs between GfK data and DST4 data. For example, live animals are included in DST4 data but not in the GfK data.
data. Sausages and prepared dishes are included in the analysis of foreign trade but not in the analysis of consumption.

In addition, Danish Meat Association (2008) has been used to describe pork consumption, imports, and exports.
Appendix F. Description of data used in Chapter 4 (chicken)

From a food safety perspective, the following available categories of chicken products are of main interest: Production form, degree of convenience and processing, and import/export characteristics. An overview is provided in Table Appendix table F.

In the GfK data, it is possible to distinguish between chicken products from two different production systems: Organic and conventional. This categorization of production systems is supplemented data from COOP Denmark reported in Baltzer (2002) where also barn and Campylobacter free chicken products could be identified\(^{64}\). Barn chicken was marketed by Danpo in 1995 but was withdrawn from the market again in 2001. There is no large scale commercial production of free range chicken in Denmark either, but free range chickens are sold through farm shops (DFR, online 2006). Unfortunately, only COOP data from the period 2000-2002 were available in Baltzer (2002).

From a food safety perspective, production system is important as chicken with outdoor access have significantly higher risks of Campylobacter infections. Salmonella risks are low in all types of production systems and risk assessment analyses have shown that there are no significant differences in Salmonella risks across chicken production systems. Consumer surveys indicate that consumer link production systems to animal welfare – not to food safety issues.

Similarly, many consumers regard the degree of processing as an indicator of convenience but processing might also be relevant in a food safety perspective. We have identified four different categories of convenience in the GfK data: Breaded, Marinated, precooked/smoked, and raw and other. Processed as well as raw chicken that are breaded are categorised as breaded. Marinated include also spiced chicken. Products marinated in a mixture of water and salt (naturally marinated) are included in the category raw and other. Precooked or smoked includes semi-manufactured chicken. There is no distinction between chilled and frozen in this categorisation. GfK also provides a categorisation of processing characteristics involving the four categories: Frozen whole, frozen cut, chilled whole and chilled cut. This product categorisation is of major interest from a safety point of view as the freezing process stops bacteria from developing (see Table 1.2).

\(^{64}\)Barn chicken (’skrabe kyllinger’) have more space than conventional chicken.
The relation between convenience/processing, naturalness, and food safety is rather complex. In example, breaded products have a high degree of convenience but a low score on naturalness and the effects on safety depend on whether the breaded chicken is raw or cooked. Similarly, marinating chicken increases convenience but decreases naturalness and its effect on safety depends on the type of marinate. Proper pre-cooking a chicken improves food safety and convenience but reduces. A frozen chicken might be considered of lower eating quality than a chilled chicken but has a lower risk of containing bacteria.

There are some important differences in the definitions used in GfK and DST4. DST4 data cover both private and industrial consumption while GfK includes only private consumption. DST4 includes a category other (which covers a broad range of processed chicken products e.g. chicken used in other products, chicken sausages etc.) and a category denoted conserved or cooked while products belonging to these categories are spread into different categories in the GfK data.

The foreign trade analysis includes categorisation according to processing level and the processing characteristics: Chilled or frozen (as indicated in Table 5.1). Also the most common foreign trading partners are described. The description of foreign trade is based on data from DST using the EU combined nomenclature. Hence, the commodity group chicken includes all commodities where the content of chicken is specified in the EU combined nomenclature, e.g. whole and cut chicken, offal, livers, live, cooked etc (listed in appendix 3). An important omission is chicken fat, which cannot be disaggregated from the group poultry fat. The list used is a subgroup of the broader poultry list used by DST in the agricultural statistic.

The description of foreign trade is based on equating consumption with production plus imports less export plus changes in stock. The approach is similar to the method used by DST. Data on production, export and stock are obtained from Danish Poultrymeat Association while import data are obtained from DST (see the list in appendix 3).

In addition, Danish Meat Association (2008) and Danish Poultry Council (2007) have been used to describe pork consumption, imports, and exports.
<table>
<thead>
<tr>
<th>Description of Characteristics</th>
<th>Categories</th>
<th>Data</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production system</td>
<td>conventional, organic</td>
<td>GfK</td>
<td>1997-2004</td>
</tr>
<tr>
<td></td>
<td>conventional, organic Campylobacter free, barn</td>
<td>Baltzer (2002), based on COOP</td>
<td>2000-2002</td>
</tr>
<tr>
<td>Convenience/Processing</td>
<td>breaded, marinated precooked/smoked, raw and other</td>
<td>GfK</td>
<td>2001-2004</td>
</tr>
<tr>
<td>Processing</td>
<td>whole, cut, other</td>
<td>DST4 Danish Poultry Meat Association</td>
<td>1998-2004</td>
</tr>
<tr>
<td>Processing</td>
<td>frozen/whole, frozen/cut, chilled/whole, chilled/cut</td>
<td>GfK</td>
<td>1997-2004</td>
</tr>
<tr>
<td>Processing</td>
<td>frozen/whole, frozen/cut, chilled/whole, chilled/cut, conserved or cooked, other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>foreign trade</td>
<td>(7 largests) Germany, Netherlands</td>
<td>DST4 Danish Poultry Meat Association</td>
<td>1997-2005</td>
</tr>
<tr>
<td>trading partners, import</td>
<td>Sweden, France</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Brazil, Spain</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>United kingdom</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>trading partners, export</td>
<td>(7 largest) Sweden, South Korea</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Germany</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>United Kingdom</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>USA, Malaysia</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lithuania</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix G. Description of data used in Chapter 5 (eggs)

The categorization of production characteristics of the eggs sold for private consumption includes four different production categories: Battery, barn, organic, and free range\(^65\). The descriptions of consumption patterns are based on data from the Danish Veterinary and Food Administration who keeps records over all sales done through authorized Danish egg packers. The available data covers the period 1997-2005 and includes information on from where egg packers have received eggs (imports, other egg packers or from producers) and who they are selling to (companies producing egg products, export, other egg packers or retail/grocers). Consumption is also categorized according to processing characteristics. Using GfK data, eggs are divided into shell and pasteurized eggs. The data span the period 1997-mid 2004. Note that pasteurized eggs were not registered separately until in June 1999. The description of foreign trade in eggs is based on data from DST4. The definition of eggs includes the commodity groups listed in appendix 4. The list is similar to the one used by DST in the agricultural statistics (DST2). The categorization of processing characteristics in DST4 and GfK differ: 1) Eggs for hatching are included in the foreign trade description based on DST4 but are not included in the GfK data 2) there is a separate category called pasteurized eggs in GfK data whereas pasteurized eggs are categorised under egg products in the DST data base 3) in DST4, private and industry consumptions are included whereas GfK includes household consumption only. An overview over categorisations and available data is provided in Appendix table G.

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\(^65\) In Danish: Battery (bur), barn (skrabe), free range (fritgående), organic (økologisk).
### Table G.1. Categories of eggs analysed

<table>
<thead>
<tr>
<th>Description of</th>
<th>Characteristics</th>
<th>Categories</th>
<th>Data</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Consumption patterns</strong></td>
<td>Production system</td>
<td>Battery, barn, organic, free range</td>
<td>Danish Veterinary and Food Administration</td>
<td>1997-2005</td>
</tr>
<tr>
<td></td>
<td>Processing</td>
<td>Shell, pasteurized</td>
<td>GfK</td>
<td>1997-2004</td>
</tr>
<tr>
<td><strong>Foreign trade</strong></td>
<td>Processing</td>
<td>Eggs for hatching, shell eggs, egg products</td>
<td>DST4</td>
<td>1997-2006</td>
</tr>
<tr>
<td></td>
<td>Trading partners, import</td>
<td>Holland, Poland, Germany, Sweden, Finland, Belgium, India, Other</td>
<td>DST4</td>
<td>1997-2006</td>
</tr>
<tr>
<td></td>
<td>Trading partners, export</td>
<td>Sweden, South Korea, Germany, United Kingdom, U.A.E., Malaysia, Lithuania, Other</td>
<td></td>
<td>1997-2005</td>
</tr>
</tbody>
</table>