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The Industrial Meat Processing Enterprises in the Adaptation Process of Marketing Management of the European Market

Ladislav Mura

*Dubnica Institute of Technology, Department of Specialised Subjects
Slovak Republic*

1. Introduction

Coming on globalization, international economical interdependency, generate new business chances and move into territorially and qualitatively new dimensions of enterprising. In the current sharp competitive struggle the successful and quick application of results of the research and technological improvement together with innovation of products and services to forecast the needs of consumers are on the first place. Adaptation to the new conditions of the market is expected in the field of marketing management selection of adequate marketing and competitive strategy for building a strong market position and for perspective additional development of business. [6]

Agro-food market conditions have dynamically changed in the last 20 years. The biggest influence on the market had the ownership transformation, later the penetrating of foreign investors into the several branches of food industry. [11]

Formation of business environment was markedly influenced by the accession of the Slovak Republic into the EU, together with the need of adaptation to new conditions of the united market. Enterprises have adjusted to competitive environment, they changed the intracompany management, and implemented innovations.

Especially for the branches of food industry it was important to modernize the technological accessories, to fulfill the challenging quality and hygienic standards asked by the European norms. Aforesaid aspect was obligatory to put into the marketing management adaptation of concrete businesses. [1] New conditions, which are characterized by a highly developed market - where the supply overtops the demand - relative consumers saturation of their basic wants, called for adaptation of supplying companies to consumers needs. The marketing management is one of the basic expectations of effective and successful company operations. The managers of Slovak companies are aware of the demanding market background. [7]

2. Materials and methodology

Based on exploration of marketing management adaptation and on analyzed sample of meat processing plants in the period of changing market conditions, in the horizon of the years 2002 - 2006, is the main aim of the article to define the determining factors of successful marketing management adaptation to the conditions of the common EU market. Partial

aims are as follows: to analyze the marketing management of the examined enterprises before the enter of the Slovak Republic into the EU, to analyze the marketing management of the examined enterprises after the Slovakia's entry into the EU, to characterize the business activities of meat processing plants on the domestic and foreign markets, to prepare the SWOT analysis and to specify the factors of the successful marketing management of analyzed meat processing plants.

Objects of research are the biggest and the most important plants of meat processing industry of Slovakia. The influential sample is created by the enterprises producing 74,8% of the Slovak meat processing companies production.

To fulfill the stated aim a primary research within the meat processing companies was needed. Basic information and data were obtained by a questionnaire, by managed interviews with top management and by panel discussion in order to define the key factors of successful adaptation of the marketing management. To keep the sensitive data we will use the following identifications: "comp.1", "comp.2", etc. in our article. Additional sources of information were secondary sources such as the Slovak agricultural and food industry reports (so-called "Green report"), analytical works of the Slovak payment agency, analytical and internal materials of the Ministry of Agriculture of the Slovak Republic, and outputs of research works in the given topic.

To process the primary and secondary information logical methods, selected mathematical and statistical methods, methods of descriptive statistics, SWOT analysis were used. Relations between particular characters were quantified and examined on the significance level of $\alpha=0,05$ by the chi quadrade test and the correlation coefficients. Interpretations of the outcomes are done by the "p-value".

3. Theoretical scopes

Conditions of business activities in the sector of agro-food complex are markedly influenced by turbulent background of the agro-market, changing rules of financial supports, social and economical spheres of the life in Slovakia. In the current period, just the smaller parts of the managements of agro-food industry apply marketing practices. [8] With a consecutive enter of international companies into the Slovak food processing enterprises, the increasing need of marketing management in relation to successfulness on the market can be observed. A marketing approach to the business management is the eminent condition for successful business activities.

The success of an enterprise depends on numbers of factors and conditions, among which the qualitative marketing management takes the first place in dynamically changing conditions. Marketing management is a systematic and goal-seeking activity, aimed at the maximum utilization of abilities and properties of the enterprise, with the goal of stable status on the market and competitive advantage besides meeting the customers' needs. In today's globalization conditions and marketing structures integration, the territorial expansion of marketing management becomes a scope on the target markets. [8]

Based on identified demands and requests, a company creates the most adequate marketing strategy for placement on the given market. A selected marketing strategy is declared by a marketing mix. Practically, the successful marketing mix application depends on the three conditions [4]:

- tools of marketing mix must chronologically form a constant and harmonic unit,
- facilities of marketing mix tools have to reflex of eventual market development and company situation
- intensity of the usage of several tools of marketing mix must be sufficient

Seriousness of the listed operations consists in the moving conditions in time and in their correlations.

The latest trends in marketing shows, that marketing is an integrated complex of actions focused on customers and the market. Marketing steps must be at the same time re-bounded with other processes in the company and to be an integral part of the management.

Marketing management is a continuous process of analysis, planning, implementation and control. Its sense is the creation and maintenance of long-standing relationships with target customers and consumers, which help companies to reach the given targets. [2] The aim of marketing management is to identify consumers' needs and wishes, to create a vision of innovative products and to set up the company processes in the way to be able to present for competition a product of higher quality and efficiency.

Coming on with globalization of the world economics and the integration processes causes that enterprises operate their businesses more and more in the international environment, rank into the foreign markets to reach a better valorization of the company capital. [5] The companies are under an extreme competitive pressure.

4. Result and discussion

Integration of the Slovak Republic into the market structures of the EU besides the positive sides was also taken negatively by the business sector. This is valid for most of the agro-food companies. On one hand, for Slovak companies it was a chance to join the united market of the EU, on the other hand, it was a must to fulfill the demanding conditions of hygienic, qualitative and veterinary norms. The high level of these parameters caused the downfall of many companies, which were not able to adapt to the changed conditions. The fulfillment of particular norms and standards necessitated serious investments into the technological facilities and the reconstruction of existing producing companies.

Adaptation of meat processing companies to the new legal and market conditions was the first and basic premise of the successful business activities on the internal EU market. This form of adjustment, so called compulsory adaptation, allows the concrete enterprises to practice their business activities in the field of agro-food business.

The European Union represents an internationally, extra-nationally and nationally marked business environment. Some of the legal, political, economical and technological factors of a marketing mix of the EU members do not have clear international or national character, but rather a combination of national and extra-national norms, rules and politics. The objects of company marketing management of integrated economics are first of all the high quality production orientation, its ability to compete and the ability to achieve a place on the united market. Together with the strategic marketing management they are focused on the product differentiation and increasing the surplus value of products. [12] This field of marketing management can be denominated as a voluntary form of adaptation for the new conditions with the aim to achieve a competitive advance and a bigger market share. The choice which marketing strategy will be used to reach the marked target is on the concrete company.

The objects of our analysis were nine biggest animal firms producing plants in Slovakia whose production covers 74,8% of the market demand. Data obtained by research are considered as a case study. The focus is on selected marketing management and economical indicators. The secondary data were obtained from Statistical office of the Slovak Republic. The table 1 presents the biggest meat processing factories in the years 2002 - 2006 in Slovakia based on data of the Statistical office of the Slovak Republic. [10]

Nr.	2002	2003	2004	2005	2006
1.	Tauris, a. s.	Tauris, a. s.	Tauris, a. s.	Tauris, a. s.	Tauris, a. s.
2.	Hrádok	Hrádok	Hrádok	Mecom, a. s.	Mecom, a. s.
	Mäsokombinát, s.r.o.	Mäsokombinát, s.r.o.	Mäsokombinát, s.r.o.		
3.	Mecom, a. s.	Mecom, a. s.	Mecom, a. s.	Hrádok	THP, a. s.
				Mäsokombinát, s.r.o.	
4.	THP, a. s.	THP, a. s.	THP, a. s.	PM Zbrojníky, a. s.	Hrádok
					Mäsokombinát, s.r.o.
5.	Hyza, a. s.	PM Zbrojníky, a. s.	PM Zbrojníky, a. s.	THP, a. s.	PM Zbrojníky, a. s.
6.	Hydina ZK, a. s.	Tauris Danubius, a. s.	Tauris Danubius, a. s.	Tauris Danubius, a. s.	Hyza, a. s.
7.	Tauris Danubius, a. s.	Hyza, a. s.	Hyza, a. s.	Hyza, a. s.	Tauris Danubius, a. s.
8.	Hydina, a. s.	Hydina ZK, a. s.	Hydina ZK, a. s.	Hydina ZK, a. s.	Hydina ZK, a. s.

Table 1. The biggest meat-processing companies in Slovakia. Source: own processing

As the table shows, the biggest and at the same time the most successful business entity in the branch of meat-processing in 2002 - 2006 was the company Tauris, a.s. It holds its leading position for a long term thanks to business strategy, innovations and the effective marketing management. The second and third most important subjects – Hrádok Mäsokombinát, a. s. and Mecom, a. s. hold their position stable. The companies THP, a. s. and Hyza, a. s. started to fall behind the leading processing companies and as separate subjects they could not stand the competing struggle what culminated in a fusion to a single company.

For the identification of strengths and opportunities, the weaknesses and threats there was prepared a SWOT analysis in the sample of analyzed meat-processing companies. A summary review about the situation in the particular companies, overall information about the products, delivered certificates, turnover development, strengths and opportunities, the specification of weaknesses and the forecast of threats from the point of view of the company documents are given in the table 2.

The business entities which took part in the research reacted the changes in their macro-background and stepwise adapted to the new social and economical conditions. Examined enterprises not only implemented, but also permanently kept the production process in accordance to the strict conditions of critical control points of HACCP (Hazard Analysis Critical Control Point). Besides of this system they had implemented a system of quality management based on norms of ISO 9001, or ISO. 9002. The research showed the time slip in the implementation of systems of quality management at the particular companies which caused a competitive advance for some of them. Company 1 and company 3 which were flexible with the implementation of systems of the quality management based on norms of ISO became the leaders on the market with an adequate development of their turnover.

Adaptation to the strong technological norms asked for high investments to purchase and implement new technologies and technological procedures for meat processing to meat products. The investment activities were insured by companies by credit lines what on the other hand caused a high finance and capital indebtedness (Company 2 and Company 5). The opportunity to obtain the indebted companies motivated financial groups to enter the agro-food industry. Financial and investment groups as Penta Investments, a. s. and Eco Invest, a. s. are such examples.

	Company 1	Company 2	Company 3	Company 4
Product portfolio	132 types of products	252 types of products	224 types of products	110 types of products
System of quality management and the date of implementation	ISO 9001 – 2003 SK 15 – 1996 SK 5 – 2001 SK 618 – 2004	ISO 9001 – 2003 SK 6061 – 2004	ISO 9001 – 1998 ISO 9002 – 1998 BRC Food – 2003 IFS – 2003 SK 63 – 2003	ISO 9001 – 2002 ISO 14001 – 2006 SK 61 – 2003
HACCP	from the year 1997	from the year 1998	from the year 2004	from the year 2001
The turnover evolution during the analyzed period	107,5 mil. € - 107,9 mil. € ↑	75,6 mil. € - 63,0 mil. € ↓	54,8 mil. € - 81,3 mil. € ↑	70,3 mil. € - 38,6 mil. € ↓
Strengths	modern technology, product innovations, capable human resources, long term relationships with chains	modern technology, capable human resources, original recipes, good geographical location in relation to foreign markets, own abattoir	experienced management, strategic marketing, investments to the technologies, extension of producing capacities, acquisitions of small companies	capable human resources, own cannery
Weaknesses	Capital indebtedness, improper capital structure	tight range in chains, promotion	duplicity of management, improper organization and management structure	stray marketing, absence of management skills
Opportunities	penetration to the foreign markets, EU funds, increasing of assurance of consumers	penetration to the foreign markets, reinforcement of promotional activities, wider product portfolio in the chains	penetration to the foreign markets, innovation of product portfolio	penetration to the foreign markets, concentration of the branch, acquisition of companies out of EU norms
Threats	overhead costs, price pressure of chains - product quality fall down, competitive faith	overhead costs, the real income fall down of consumers	overhead costs, competitive faith	overhead costs, price pressure of chains - product quality fall down,
Promotion	active promotion by participation on home and foreign exhibitions	active promotion by participation on home and foreign exhibitions	active promotion by participation on home and foreign exhibitions	active promotion by participation on home and foreign exhibitions

Table 2. Some aspects of marketing mix and SWOT analysis. Source: own processing

	Company 5	Company 6	Company 7	Company 8	Company 9
Product portfolio	100 types of products	190 types of products	40 types of products	slaughter	40 types of products
System of quality management and the date of implementation	ISO 9001 – 2000 SK 64 – 2004	ISO 9001 – 2004 SK 3092 – 2004	ISO 9002 – 1996 SK 15 – 1996	SK 26 – 1997	ISO 9001 – 2004 SK 630 ES – 2004 SK 3031 – 2004
HACCP	From the year. 1998	From the year 2004	From the year 1995	From the year 1999	From the year 2000
The turnover evolution during the analyzed period	256 mil. € - 430 mil. € ↑	95 mil. € - 161 mil. € ↑	373 mil. € - 336 mil. € ↓	-	140 – 484 mil. € ↑
Strengths	quality of products,own retailing, capital interconnection whit the company 1	Flexibility, adaptability and giving on regional changes, available prices, tailor-made approach	product and packing innovations, capital interconnection whit the company 1	available prices, modern technology, bio-meat production	original recipes, flexibility, capable human resources, own abattoir,
Weaknesses	absence of marketing activities	only local entrepreneurship, weak marketing policy	high operating costs (special financial costs), absence of export	only jointing meat, fluctuation of human resources	absence of export, narrow range of goods, weak marketing policy
Opportunities	capital interconnection whit company 1, penetration to the foreign markets, new hypermarkets	penetration to the foreign markets,	penetration to the foreign markets, innovation of product portfolio	promotion, penetration to the foreign markets	penetration to the foreign markets, promotion
Threats	absolute submission of business policy to company 1, competitors fight	competitors struggle	operating costs, competitors fight, force of trade string	force of trade string, operating costs	operating costs, force of trade string, competitors fight
Propagation	Passive propagation	Passive propagation	active promotion by participation on home and foreign exhibitions	Passive propagation	Passive propagation

Table 3. Some aspects of marketing mix and SWOT analysis in other companies. Source: own processing

The tables 2 and 3 give a synthetic overview about the situation in particular businesses and give an integrated information about the products, quality certificates, sales dynamics, strengths and weaknesses of companies inclusive the identification of opportunities and threats from the point of view of a concrete company.

The synthesis of determinated facts of the SWOT analysis identifies the absence of strategic management elements in the selected group of companies. In one case there is an absence of the strategy of human resources development with limited motivation, two fifths of businesses do not use actively the possibilities of the communication mix and none of the companies entered an international market during the analyzed period. The potential threats are the epidemic diseases of animals (BSE, KMO), low net margin in the meat production, the enforcement of the law, limited defense of the home market. As substandard factors remain the increasing prices of energies and of raw materials and the decreased consumer's acceptance. The managements of enterprises agree that under the impact of the entrance of Slovakia into the EU domestic and external competition sharpened and the companies do not feel an adequate defense of their home market against external suppliers. Discriminating practices of foreign commercial chains express themselves by abusing their dominant position and by increasing power against processers.

Strengths are positive factors influencing the future successfulness what concerns the analyzed sample of enterprises: the implemented system of quality management, modern technological equipment's, qualitative and innovated products, capital cohesion of companies with basic industry. With the implementation of quality systems we can see the time difference in achieving it, which is followed by a competitive advantage for companies with an earlier certification. On the other hand, the purchase of modern technologies caused indebtedness of some subjects and consequently a takeover by stronger subjects. Opportunities are new distribution channels (purchasing alliances, hypermarkets), shopping practices of consumers (packed meat, meat semi-products), internalization of business, penetrating into the foreign markets, and reinforcement of marketing activities.

Sharpened competitive struggle on the market expresses itself in the dynamics of sales of analyzed companies. We were interested in the development of total sales in the period 2002 - 2006. Based on our detections, the growth achieved six subjects (66,66%), stagnation two companies (22,22%) and decrease - one company (11,11%).

Through built-up questionnaire we detected changes in the amount of sales while the companies were selling goods under a private brand name. We tested the following hypotheses:

H₀: We expect that there is no dependence between the share of sales on the foreign market and sales under the private brand names.

H₁: We expect that there is a dependence between the share of sales on the foreign market and sales under the private brand names.

The hypothesis was examined with the chi-square test of independence. The strength of dependence was determinated by the Persons contingency coefficient C. The results are shown in the table 4.

Test description	Test	Statistics	P-value
test of independence	chi-square	18,7682	0.0009
strength of dependence	contingency coefficient		0.7145

Table 4. Testing of independence. Source: SAS software

Calculated value of test criteria χ^2 is bigger than the critical value of χ_{tab} . We refuse the hypothesis H_0 and accept the hypothesis H_1 based on which there exists a dependency between listed qualitative attributes. According to the values of Persons contingency coefficient we can declare a very strong dependency. Production of goods under private brand names as well the expansion in the foreign markets show a strong adaptability for the intensive competitive environment of the company and show utilization of potential chances of achieving a position on the market.

In the next part of the research we focused on the store types which take the biggest part on the sales of goods during the analyzed period. The conclusions are in the graph 1.

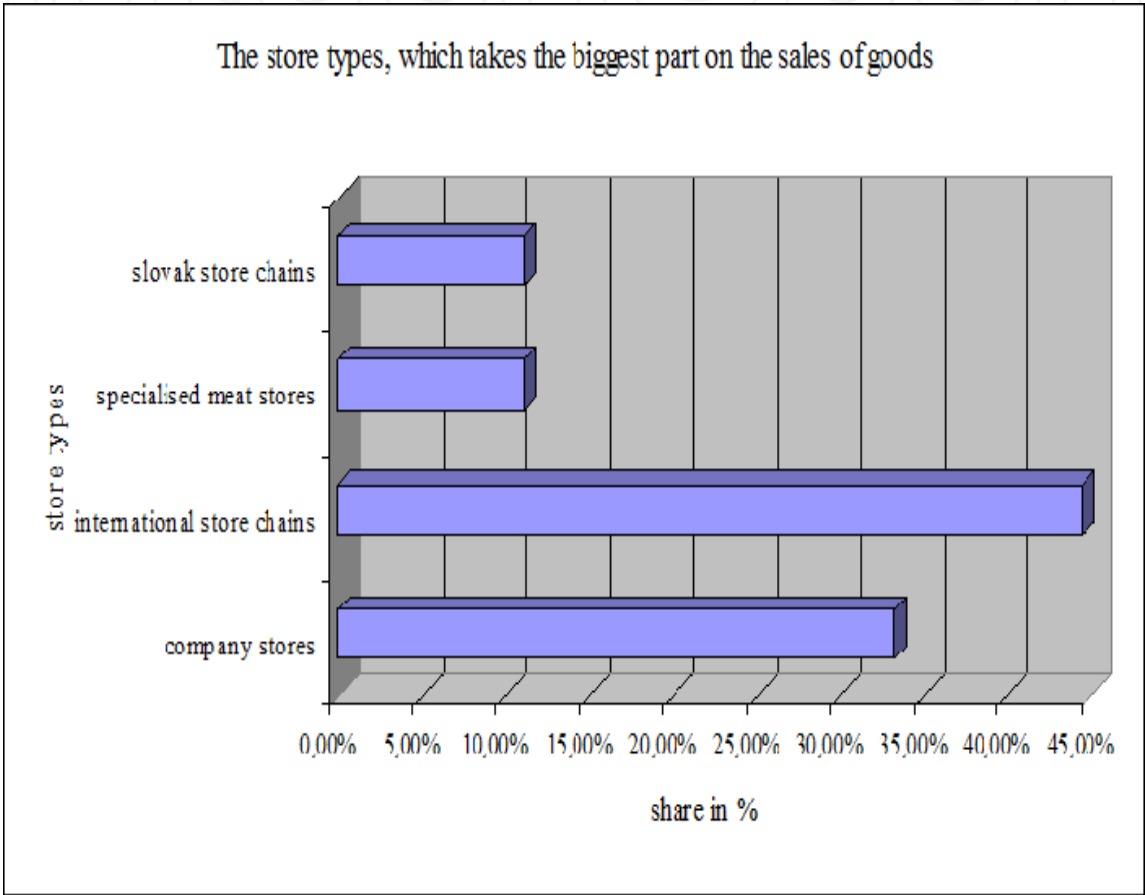


Fig. 1. The store types, which takes the biggest part on the sales of goods. Source: own processing

As the graph 1 shows, the biggest part of production is sold through international chains – four companies with share of 44,44%. Thanks to mentioned store types the production of Slovak meat processing companies is taken onto the foreign markets too. This fact helps enterprises to ensure the sales of bigger part of the production, to increase the profit and to build up the status on the target markets. By 11% less, the Slovak chains participate on sales of production - in case of three analyzed companies. The same share on sales - 11,11% have specialized meat stores and the company store. It is true in one case in company 1. In spite of the low share on the sales channels the specialized meat stores and the company stores have, they provide to customers the full range together with products with a higher added value.

The Slovak entry into the EU meant for Slovak companies a possibility to achieve the foreign markets of the EU members too, but on the other hand the competition accelerated. We have tested if there is a dependency between increased domestic competition after the Slovakia’s entry into the EU and if there are larger requests to adapt to the quality requirements and to the adherence of quality standards. We have verified the hypothesis:

H₀: We expect that there is no dependence between increased domestic competition after the EU entry and the larger requests to adapt to the quality requirements and to the adherence of quality standards.

H₁: We expect that there is a dependence between increased domestic competition after the EU entry and the larger requests to adapt to the quality requirements and to the adherence of quality standards.

The hypothesis was examined with chi-square test of independence. In regarding to achieved values the strength of dependence was not determined. The results are given in the table 5.

Test description	Test	Statistics	P-value
test of independence	chi-square	1,1688	0,2796
strength of dependence	contingency coefficient	-	-

Table 5. Testing of independence. Source: SAS software

Calculated value of test criteria χ^2 is lower than the critical value of χ_{tab} . We accept the hypothesis H₀ based on which there does not exist a dependency between listed qualitative attributes. We refuse the hypothesis H₁. It means that companies were not motivated to take a bigger attention to ensure the quality of their production after the entry to the EU. In the future perspectives we recommend companies to reevaluate the possible impact of sharpened competition on their businesses and to actively participate on the building of their position on markets.

In the frame of marketing management analysis in the examined group of processing companies we asked the enterprises if there is an influence of various marketing steps to increase the sales. The scale of answers was from 1 to 10. The lowest influence has 1, the biggest 10. The businesses rated the influence of concrete marketing actions differently. To analyze the results we used the methods of descriptive statistics - median. The found status is illustrated in the graph 2.

The marketing step “price, price proceeding, price reduction” has clearly achieved the highest score on the ranking scale. Based on the opinion of analyzed companies, this has the biggest influence. The second most eminent marketing step is the B2B marketing which includes good relationships with consumers , contacts, business presentations. A close result was achieved within the factor “production under private brand names”. It helps companies to rank into the different market segments. According to experience of managements within effects less influencing the sales increase there are factors such as promotion, in-store testing and product innovations. Different usage of marketing actions and tools in practice causes the differentiation of producers’ offers.

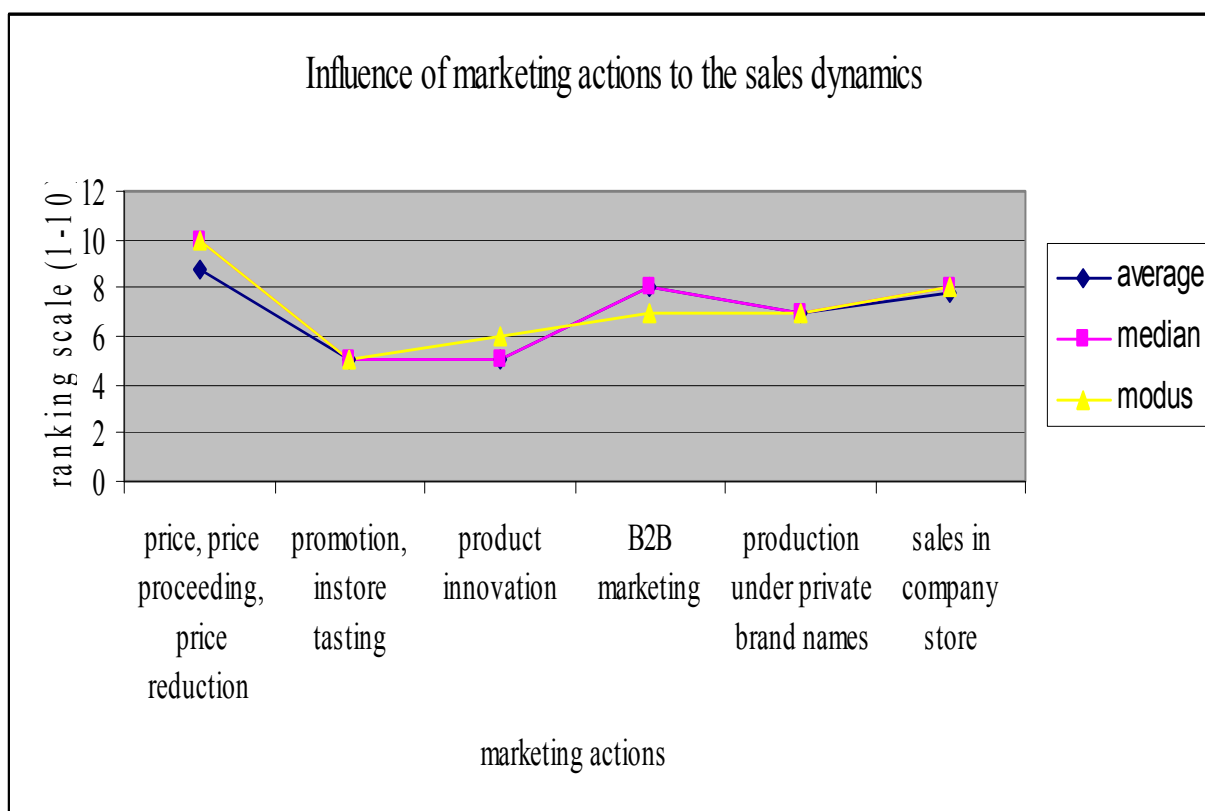


Fig. 2. Influence of marketing actions to the sales dynamics. Source: own processing

5. Conclusion

The branch of meat processing is a significant part of the food industry branch. It cannot be separated as it is an integrated part of food industry. The research revealed weak and limited connections between agricultural production and capacities of processing companies and sales to the stores network. Based on the achieved information and the carried out research we recommend the management of meat processing companies to focus on the following fields which we consider as a market expansion:

- production of meat products with pro-biotics,
- production of meat products with reduced content of fat,
- product portfolio diversification
- internalization of business activities, especially a penetration into the markets of V4 countries and the Russian federation,
- to administer the innovation strategies of products,
- active development of PR possibilities,
- to stabilize business relationships by informal meetings and common undertakings,
- to develop the B2B marketing,
- to renew human resources with language skills and business experience on foreign markets.

The target market identification and the identification of several market segments helps to fulfill not only the current aims but also potential expansive objectives. Selected aspects of marketing management in the business practice of meat processing companies and perspective fields for expansion determinate the winning factors of successful marketing

management adaptation for the new EU conditions. Based on Agricultural payment agency [10] it is possible to expect in the future a sharp competitive struggle on the domestic markets of the EU and the countries with open economics such as in Slovakia which must adapt to the import of cheap meat and meat products for example from Poland or Romania.

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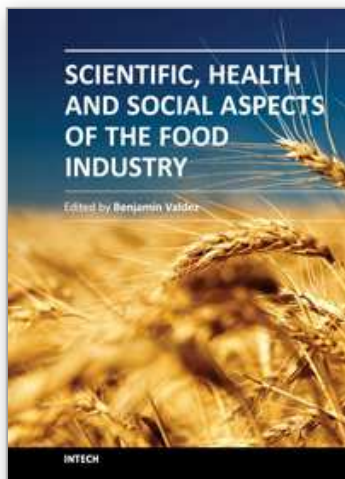
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This book presents the wisdom, knowledge and expertise of the food industry that ensures the supply of food to maintain the health, comfort, and wellbeing of humankind. The global food industry has the largest market: the world population of seven billion people. The book pioneers life-saving innovations and assists in the fight against world hunger and food shortages that threaten human essentials such as water and energy supply. Floods, droughts, fires, storms, climate change, global warming and greenhouse gas emissions can be devastating, altering the environment and, ultimately, the production of foods. Experts from industry and academia, as well as food producers, designers of food processing equipment, and corrosion practitioners have written special chapters for this rich compendium based on their encyclopedic knowledge and practical experience. This is a multi-authored book. The writers, who come from diverse areas of food science and technology, enrich this volume by presenting different approaches and orientations.

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51000 Rijeka, Croatia
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Unit 405, Office Block, Hotel Equatorial Shanghai
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中国上海市延安西路65号上海国际贵都大饭店办公楼405单元
Phone: +86-21-62489820
Fax: +86-21-62489821

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