

STIMULATORS AND BARRIERS OF DEMAND FOR FOOD (POLISH CASE)

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Abstract. The main objective of the paper is to analyse the influence of stimulators and barriers of demand for food in Poland in 2001–2014. The results of econometric and single source analyses constituted the basis for the diagnosis in this respect and determining the level of saturation of food requirements, scale of qualitative transformations related to food consumption and direction of changes related to purchasing preferences under the influence of both economic and non-economic factors. It was concluded that the overall level of economic development and consumers' disposable income still constitute significant stimulators of demand for food, although it ought to be noted that its developmental trend is associated with the level of saturation and combination of individual preferences. In the case of households with relatively high incomes, the demand for highly processed foods is created above all. The same applies to external demand, including in particular the offer of foods exported onto EU markets.

Key words: food demand, barriers, stimulators, income elasticity, preferences of food consumer

INTRODUCTION

The regularities defined by Keynes and Engel, referring to regularities in expending the income and foreseeing changes of general relations in consumption related expenditures and savings as well as changes in the expenditure structure, have proven correct for the food market on many occasions. Pursuant to Keynes' rules, the share of total consumption expenditures in total expenditures decreases along with income growth. Moreover, pursuant to Engel's rules, the share of food related expenditures decreases along with income growth. Consumption expenditures account for the largest share of

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total expenditures and, therefore, understanding the reasons underlying fluctuations in aggregated demand requires an analysis of consumption.

Pursuant to the first theory of consumption proposed by J.M. Keynes [1956], the consumption function is characterised with the following three features:

- consumption volume is determined exclusively by disposable income. In his analysis, Keynes did not consider the importance of future income or interest rates;
- the ultimate consumption inclination falls within the (0,1) range – only a part of additional income unit is dedicated by the consumer to consumption purposes, while the rest is saved;
- the average consumption inclination decreases along with income growth – wealthy people save a greater share of their income.

The first empirical studies (performed on short-term data) suggested that the consumption function proposed by Keynes provided a good reflection of consumers' behaviours. Further research performed for long-term data demonstrated that the average consumption inclination (in the long term) was constant, whereas subsequent studies revealed an insignificant relationship between disposable income and consumption volume. Thus, it turned out that consumption behaves in the manner foreseen by Keynes in the short term only. In order to clarify the discrepancy between the short- and long-term consumption function, economists referred to microeconomic basics – selections made by households in particular periods, while introducing other factors which (next to the income) would allow explaining fluctuations in consumption expenditures.

As opposed to Keynes' theory, Fisher's model demonstrates that important factors are not only the current income, but also the amount of future income and real interest rates.

Empirical research shows that consumption is characterised with much lower short-term fluctuations than income. This suggests that, while saving, people shift resources from periods of high income to periods of lower income in order to maintain a relatively constant level of consumption. Basing on Fisher's model, the lifecycle theory proposed by F. Modigliani assumes that people aim to "smoothen" the consumption level throughout their lifecycle. In particular, they will save during the period of professional activity and finance consumption during the retirement period from the resources they managed to save.

Modigliani's lifecycle model is supplemented by Friedman's model, which assumes division of the total income generated by a consumer into a fixed part (permanent, predictable part) and unexpected income (temporary income).

Pursuant to the model's concept, unexpected income growth does not have significant influence onto the consumption level, i.e. unexpected income is likely to be saved. In contrast, growth in permanent income translates onto increased consumption. Friedman argued that consumption is nearly proportionate to permanent income [Świsłowska 2005/2006].

Analyses and tests aimed at verifying correctness of currently dominating theories, i.e. the hypotheses of F. Modigliani and M. Friedman as well as of supplementing works, suggest that the predictive value of those models is frequently low. Indeed, human behaviours observed seem to deviate from conclusions drawn from approaches based on the model of a rational consumer who optimises the decisions over time.

The present analysis must include the basic principle of behavioural economics, which refers to decision making in the conditions of uncertainty and risk. It suggests that many decisions adopted by people are systematically burdened and the behaviours observed do not correspond with conclusions drawn from the theory of expected utility [Bańbuła 2006]. In the light of Bańbuła's works, it was demonstrated that predictions of the lifecycle model do not reflect the reality satisfactorily. Consumption is dependent on the level of current, not of expected income. Smoothing of consumption is not observed in any period, whether in an annual or lifelong perspective. Thus, it may be concluded that consumption follows the income. The proportionality hypothesis turns out to be untrue as well – the rate of savings depends on the individual's wealth. Upon retirement, people's savings are too low, which causes a consumption decrease. Interestingly enough, even though the consumption level could be higher at that time, this is not the case. People who end their professional activity do not reduce their savings; in fact, they do the opposite. The motive of decrease cannot explain that phenomenon. The motive of caution does appear, but concerns a relatively narrow group of individuals. Inconsistency between conclusions from the lifecycle model and the observed phenomena is, above all, due to adoption of unrealistic assumptions concerning people's behaviours and decision making processes. The normative approach presented in the lifecycle model assumes complete reasonability of entities, their long-sightedness and optimisation driven character of their actions. Yet, rich literature on behaviourism, numerous papers, research projects or simple observation of reality proves this is not the case. People have serious problems with decoding probabilities, with many of their judgements being materially and systematically burdened. They also find it difficult to resolve complex optimisation related issues. In their actions, they often turn out to be short-sighted and their preferences are not constant over time. Dynamic inconsistency of preferences means problems with self-control, which seriously hinders effective accomplishment of long-term plans. In confrontation with problems containing an element or risk, people frequently act differently than the theory of expected utility foresees. Inclusion of some of those observations only into the Behavioural Lifecycle Hypothesis (BLCH) allowed a simple and clear explanation of numerous anomalies observed by researches using the lifecycle model methodology.

From the perspective of the analysis covered by this paper, reference to empirical verification of Engel's rule is of importance. This occurred over years within works conducted by numerous researchers [Szwacka-Salmonowicz and Zielińska 1996, Szwacka-Mokrzycka 2013, Kwasek 2015]. Research pursued over years confirmed Engel's regularity assuming a falling share of expenditures on food along with growth in consumers' incomes.

MATERIAL AND METHODS

In the present paper, the basis for diagnosing the demand segment were the results of econometric and single source (Target Group Index) surveys. Information for conducting the econometric analysis was provided by investigations into household budgets, conducted by the Central Statistical Office (GUS) over 2001–2014. The basis for diagnosing

changes occurring in food consumers' behaviour patterns and evaluating changes in their preference distribution were the results of single source (TGI) surveys. The TGI survey is performed by the Research Institute of Millward Brown Company and is the only continuous project carried out in Poland on a sample of $n = 36\ 000$ respondents surveyed on an annual basis since January 1998. The surveys covers respondents aged 15–75 and allows collecting data on approximately 400 product categories, over 4,000 brands and includes information on consumers' lifestyles. The data from TGI allows performance of multidimensional analyses of the consumer market. The surveys allows positioning of an existing brand, identification of its users' behaviours, type of user or consumption as well as a detailed overview of consumers and market segments.

Results presented in the article constitute continuation of the author's research conducted in the 1990s. Moreover, the paper presents results of an econometric analysis based on the works of other authors.

STIMULATORS AND BARRIERS OF DEMAND FOR FOOD

The paper focuses on factors which stimulated or hindered the demand for food over the analysed period. The stimulators of demand for food in years 2007–2014 in Poland include the level of the country's economic development, incomes and product prices, exports and marketing instruments. One ought to emphasise that the above factors may both stimulate and hinder the development of demand, depending on the country's economic condition and level of consumers' awareness.

In 2007–2014, Poland experienced diversified conditions in terms of creating consumer demand, including the demand for food. The global crisis of 2008 and 2009 had negative impact onto the economic condition of the European Union's states. Poland, too, experienced a slowdown of GDP dynamics, even though in 2009 it was still on a positive level of 1.6%. To compare, other European Union states did not manage to stop the falling trend. In the subsequent years of 2010–2011, GDP growth dynamics in the countries of the European Union remained on the level of 1.8 and 1.3, whereas Poland was much above that level. The figures calculated for years 2010 and 2011 were, respectively 3.8 and 3.9% [Szwacka-Mokrzycka 2015]. This was caused by noticeably weakened negative consequences of the economic crisis in Poland, which occurred in 2010 as a result of increased economic activity. However, the following years saw a slowdown of GDP dynamics in Poland as a consequence of economic recession which fell on the first half of 2013. The following year 2014 shows considerable improvement in the economic condition of all EU member states, yet characterised with significant differentiation in terms of GDP growth indices as compared with 2013. In 2014, Poland was among the countries with a relatively high level of growth, i.e. by 3.4% as compared with the preceding year.

The macroeconomic measure reflecting the population's standard of living is the gross disposable income per 1 inhabitant in the sector of households. Disposable income is allocated to financing consumption and savings. The amount of income is calculated based on the purchasing power parity of the population and expressed in the universal conceptual currency of PPS (Purchasing Power Standard). The analyses

conducted demonstrated that, in 2007, the highest disposable income in the sector of households per 1 resident was that of highly developed EU states. In those countries, incomes were much above the EU-28 average (by 10 up to 24%), whereas real disposable income in Polish households in 2007 was lower than the EU-28 average by 45%. In 2007, much lower incomes than in Poland were recorded in Bulgaria and Romania. The situation changed dramatically in 2013, when the distance between Poland and EU-28 was reduced to 31%. That was accompanied by improvement of the condition of households in Bulgaria and Romania, where the share of the population's disposable incomes was, respectively 44 and 43%. One ought to note that in 2013, as compared with 2007, real disposable income per 1 resident increased in most of EU's countries. On the other hand, the rate of real income growth in particular countries was highly diversified. The highest growth dynamics was recorded in post-communist countries, i.e. in Poland, Lithuania, Bulgaria, Romania and Estonia. Other countries of the block in question remained on a stable level. The most developed EU countries also experienced significant growth in real incomes. One should also emphasise that the global financial crisis had major impact onto development of the population's incomes in 2010. In the pre-crisis period, i.e. between 2007 and 2010, considerable growth in gross incomes was recorded in EU-27 (by over 2.5%). In that period, the highest increase in real income was recorded in Poland (by 12.4%).

From the point of view of the conducted analysis, detailed information comes from surveys into the household budgets in Poland, conducted in division into household types. The research suggests explicitly that stratification of households' incomes was decreasing over 2011–2014. On the other hand, the trend related to generation of relatively highest incomes as compared with the average disposable income by households of persons conducting their own businesses, as well as above-average incomes of retired persons and pensioners and of employed persons' households is maintained. The relatively lowest level of disposable income occurs in the case of farmers' households. Decreasing stratification of households' incomes is confirmed by the falling Gini's index: in 2011–2013 by 0.012, from 0.338 to 0.326 in 2014, which shows an explicit trend related to falling diversification of households' incomes per person [*Household budgets* 2015].

Thus, it may be concluded that incomes stimulated the development of demand over the analysed period.

In the general perspective, it ought to be assumed that, with respect to food, Engel's rule was confirmed as correct. Obviously, this related to average income, whereas the analysis conducted in various income groups indicates strong influence of that factor on stimulation of demand for food in the poorest households.

The price is another factor influencing changes with respect to the level and structure of demand for food. It is the price that determines the real value and purchasing power of the income. In 2009–2014, the prices of food and non-alcoholic beverages were growing faster than general prices of goods and services. The share of food expenditures in total consumption expenditures decreased over the analysed period, which resulted from growth in salaries allowing maintenance of economic availability of food on a stable level. As compared with 2013, 2014 saw a decrease in the prices of food and non-alcoholic beverages by 0.9%, along with increase in the average real gross monthly salary by 3.4% [*Statistical annals of the Central Statistical Office* 2015].

Considering the role of exports in stimulating the demand for food, one ought to state that – beginning in 2014, as a result of the imposed embargo – exports onto the Russian market (mainly fruit, vegetables and dairy products) have been reduced. Development of exports onto non-EU markets, including in particular those of the Middle East, North Africa, East and South Asia, is an important opportunity to stimulate the demand. Obviously, conquering those sales markets is a major challenge before Polish producers, with the domestic and EU markets still playing a dominant role in shaping the demand.

As far as the impact of non-economic factors onto the demand for food is concerned, marketing factors are of considerable importance. Among these, particular attention ought to be paid to product brand and promotion. Research into the influence of reputation of the food brand on building purchasing loyalty clearly shows that the dependence became deeper during the first decade of the 21st century. That was shown on the example of industries characterised with a varied level of concentration, i.e. dairy and fat production segments [Szwacka-Mokrzycka 2013]. In subsequent years, in the light of research focused on the same segments of the food industry, a shift of that trends towards building a strong connotation of the brand with the product price was demonstrated.

LEVEL OF FOOD REQUIREMENTS SATISFACTION IN POLAND

From the research conducted by numerous authors into the level of satisfaction of food related requirements in Poland it can be concluded that the level of saturation of those needs increased considerably over 2001–2014. Such conclusions may be drawn both on the basis of econometric research [Szwacka-Salmonowicz 2003, Kwasek 2008, 2012, 2015], and single source research [Szwacka-Mokrzycka 2013, SMG/KRC 2016].

Even though the income and prices continue to determine the level and structure of food consumption in Poland, a considerable decrease of the share of consumers' spending on food must be noted in 2007–2014 within the total volume of household expenditures, from 32% in 2007 to 24.4% in 2014 [*Household budgets* 2015]. The results related to income flexibility of demand confirm considerable influence of income onto development of the level and structure of food consumption.

While evaluating the degree of satisfaction of requirements for food in 2014 in comparison with 2001, one needs to note clear reduction of income flexibility indices with respect to food consumption, which occurred over the analysed period. As compared with 2001, 2014 saw a significant reduction of food consumption flexibility in all groups (of luxury products, standard and basic products), although the degree of decrease is varied. Relatively, the greatest reduction of indices over the analysed period occurred in the consumption group connected with satisfaction of basic needs. In particular, this concerns such products as rice or eggs (reduction of the income related consumption flexibility index from 0.410 in 2001 to 0.150 in 2014 – in the case of rice, and from 0.260 to 0.110 – for eggs). For bread and potatoes, negative flexibility indices were obtained in years 2004–2014, which proves a high level of demand saturation with these products. At the same time, many products were shifted from the second group (standard products) to the third group (basic products). Such products include: vegetables and processed vegetable products, fruit and processed fruit products, juices, fish and processed fish products, yo-

ghurt, butter, cheese and meat in general. With respect to the above products, the shift to the third group was even connected with a 2–3-fold reduction of the demand flexibility indices (Table). Beef is the only product that occupies a permanent position in the group of luxury products in recent years, which is evidenced by the high level of income related flexibility index for beef consumption at 0.985 (nearly 1.5-fold increase in the consumption flexibility index over 2001–2014).

The regularity observed reflects ongoing transformation of food requirements over the analysed period. Moreover, it evidences growing satisfaction of food related needs over the first and second decades of the 21st century.

Another change trend, observed in the comparative analysis of needs in 2014 in comparison with 2001, is the scale of qualitative transformations with respect to consumption of food. The comparative analysis of needs in 2014 in comparison with 2001 revealed that, with respect to products located within groups one and two (i.e. luxury and standard products), the position of quality is already well established and, therefore, the scale of changes is much smaller than in the group of products which satisfy basic needs. Moreover, the analysis of changes in the area of food related needs demonstrated that qualitative transformations are highly the result of substitution processes among the food product groups and within those groups. Ongoing substitution is reflected in the shift of many products from group I (luxury products) to group II (standard products), as well as transfer of many items from group II to group III – of basic products. The econometric analysis proved that this concerned, above all, such products as fish and processed fish products, cakes and fresh fruit, which were perceived as luxury products still in the 1990s. Intensification of the substitution processes may also be evidenced by the shift of certain products from group II to group III, as well as regrouping of certain categories within the groups, which concerns above all such products as meat, cheese, dairy products for which the substitution effect became clearly visible over the analysed period (Table).

Summing up the above analyses, one ought to add that the performed analysis of transformations regarding food requirements of Polish households demonstrated a certain continuation of the trends evidenced in previous research [Szwacka-Salmonowicz and Zielińska 1996, Szwacka-Salmonowicz 2003, Kwasek 2008, 2012]. The analysed period of 2001–2014 saw clear dynamic growth with respect to transformations related to growth in food related needs saturation, qualitative transformations and substitution processes.

An important element supplementing the conducted analysis is the presented evaluation of food requirements satisfaction (with respect to selected categories of the market of dairy and fat products) and evaluation of consumers' purchasing preferences in the light of single source data (TGI). The following analytical aspects were considered:

- analysis of trends in the consumption of product categories selected for the research;
- distribution of purchasing preferences in terms of prices and quality (product brand) – based on evaluation of the level of price and qualitative indices [Szwacka-Mokrzycka 2013, SMG/KRC 2016].

In order to determine purchasing preferences of the buyers of dairy products and vegetal fats, the analysis was performed on the basis of:

- percentage share of consumption of the given brand towards all consumed products of the given category;
- level of the buyer's brand and product price orientation.

Table. Total income related flexibility of the demand for food at Polish households in years 2001–2009

Specification	2001	2004	2009	2014
Juices	1.240	1.100	0.769	0.489
Yoghurt	0.850	0.680	0.470	0.393
Fish and processed fish products	0.780	0.410	0.354	0.397
Fruit and processed fruit products	0.730	0.380	0.364	0.429
Cheese	0.700	0.380	0.337	0.304
Beef	0.650	0.650	0.768	0.985
Butter	0.620	0.470	0.386	0.506
Poultry	0.530	0.110	0.090	0.105
Meat, giblets and processed products	0.520	0.140	0.130	0.116
Pork	0.510	0.130	0.143	0.113
Vegetables and processed vegetable products	0.500	0.180	0.192	0.234
Rice	0.410	0.120	0.155	0.150
Eggs	0.260	0.130	0.096	0.110
Milk	0.180	0.160	0.109	-0.043
Vegetal fats	0.120	-0.070	-0.074	0.075
Bread	0.110	-0.030	-0.012	-0.027
Flour	0.110	-0.010	-0.026	^a
Potatoes	0.110	-0.020	-0.043	-0.029
Sugar	0.100	0.050	0.004	-0.013

^a data unavailable.

Source: Szwacka-Salmonowicz [2003], Kwasek [2008, 2012, 2015].

The research performed clearly reveals that the level of satisfaction of food requirements was growing over the analysed period, both with respect to standard products, i.e. yoghurt, oils, margarine (traditional products) and to highly processed (new generation) products. That suggests that the above categories occupy a fixed position in the food consumption model in Poland. In the light of research results, one can conclude that the degree of penetration of the above categories (consumption declared by consumers) in years 1998–2014 was growing successively and was, respectively: yoghurt – 79%, oils, olive oil – 96%, margarine – 72%. The degree of food related needs satisfaction is much lower with respect to highly processed products. In the analysed period, it recorded similar levels for both desserts and milk based beverages, i.e. 28%. From the point of view of evaluating the purchasing preferences with respect to price and quality (product brand), an analysis of price and qualitative indices is important. The index analysis was performed based on buyers' associations connected with the given brand. This allowed diagnosing the importance of product brand and price to the consumer. In 2009–2014, the trends observed with respect to purchasing loyalty on the market of dairy and fat products were reversed. Whereas in 1998–2008 there progressed the

process of diversification among consumers clearly focused onto product quality and price, the subsequent period (2009–2014) was also characterised with increased share of consumers oriented on product price, but along with a decreased share of consumers focused on quality. The results obtained may evidence a growing demand among consumers for relatively cheap brands on the market of dairy and fat products (especially in the light of development of a wide range of “private label” brands). At the same time, one ought to note that in years 2009–2014 the research related to orientation of dairy and fat consumers was performed with respect to the overall category, and not with respect to particular product brands [SMG/KRC 2016]. The trend consolidated with respect to buyers characterised with relatively low incomes. Results of the research conducted indicate a growing share of saturation of food related needs in Poland over the first and second decades of the 21st century. What is more, they confirm the ongoing substitution processes within particular product groups, which was already emphasised in interpretation of the results of econometric research.

GROWTH POSSIBILITIES AND DIRECTIONS RELATED TO DEMAND FOR FOOD

Research conducted in various configurations indicates that growth in the demand for food on the Polish market is possible. Above all, this concerns food products characterised with a high degree of processing. Despite the possibilities related to growth in domestic demand, mentioned above, it ought to be concluded that the domestic market is restricted by strong internal competition caused by operating in similar revenue and cost related conditions (Report of Bank BGŻ BNP PARIBAS from 2015). As far as creating the demand for food is concerned, the most important factor is the domestic market, and in particular the EU market. The analysis conducted with respect to the degree of satisfaction of food consumers’ needs indicates a falling internal (domestic) demand. The analyses performed in this paper demonstrate that the demand growth trend is connected with products characterised with a high degree of processing, offered in a manner and form which enhances their utility.

CONCLUSIONS

The analyses performed demonstrate that the demand for highly processed foods is still high, both in the perspective of domestic and external market.

This denotes generation of demand for “new generation” food products, characterised with a much lower degree of requirements saturation than in the case of traditional products. Results of the econometric and single source research conducted indicate a growing share of saturation of food related needs in Poland over the first and second decades of the 21st century. This claim ought to be referenced to the manner of satisfying food related needs by households with relatively high incomes. In relatively poorest households, the degree of satisfaction of basic food related needs is still low. From the point of view of performed considerations, of particular importance is correct (in line with identi-

fied market trends) decoding of changes occurring within consumer behaviour patterns. A correct response to those changes ought to involve profiling of the offer in compliance with food buyers' expectations. These problems become particularly topical in the conditions of shrinking domestic demand and limited possibilities related to creation thereof on the broad EU market and in Eastern European countries.

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STYMULATORY I BARIERY POPYTU NA ŻYWNOSĆ (STUDIUM POLSKIE)

Streszczenie. Celem przewodnim artykułu jest prześledzenie wpływu czynników stymulujących bądź ograniczających popyt na produkty żywnościowe w Polsce w latach 2001–2014. Podstawę do diagnozowania w tym zakresie stanowiły wyniki badań ekonometrycznych oraz jednoźródłowych. Na ich podstawie ustalono poziom nasycenia potrzeb żywnościowych, skalę przemian jakościowych w spożyciu żywności oraz kierunek zmian preferencji nabywczych pod wpływem zarówno czynników ekonomicznych, jak i pozaekonomicznych. Stwierdzono, że ogólny poziom rozwoju gospodarczego i dochody rozporządalne konsumentów stanowią wciąż istotny stymulator popytu na żywność, choć należy zauważyć, że tendencja jego rozwoju jest związana z poziomem jego nasycenia i układem indywidualnych preferencji. W gospodarstwach o relatywnie wysokich docho-

dach popyt jest kreowany przede wszystkim na produkty żywnościowe o wysokim stopniu przetworzenia. Dotyczy to również popytu zewnętrznego, a w szczególności oferty żywnościowej eksportowane na rynki UE.

Słowa kluczowe: popyt na żywność, bariery, stymulatory, dochodowa elastyczność, preferencje konsumentów

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