



## Abstract

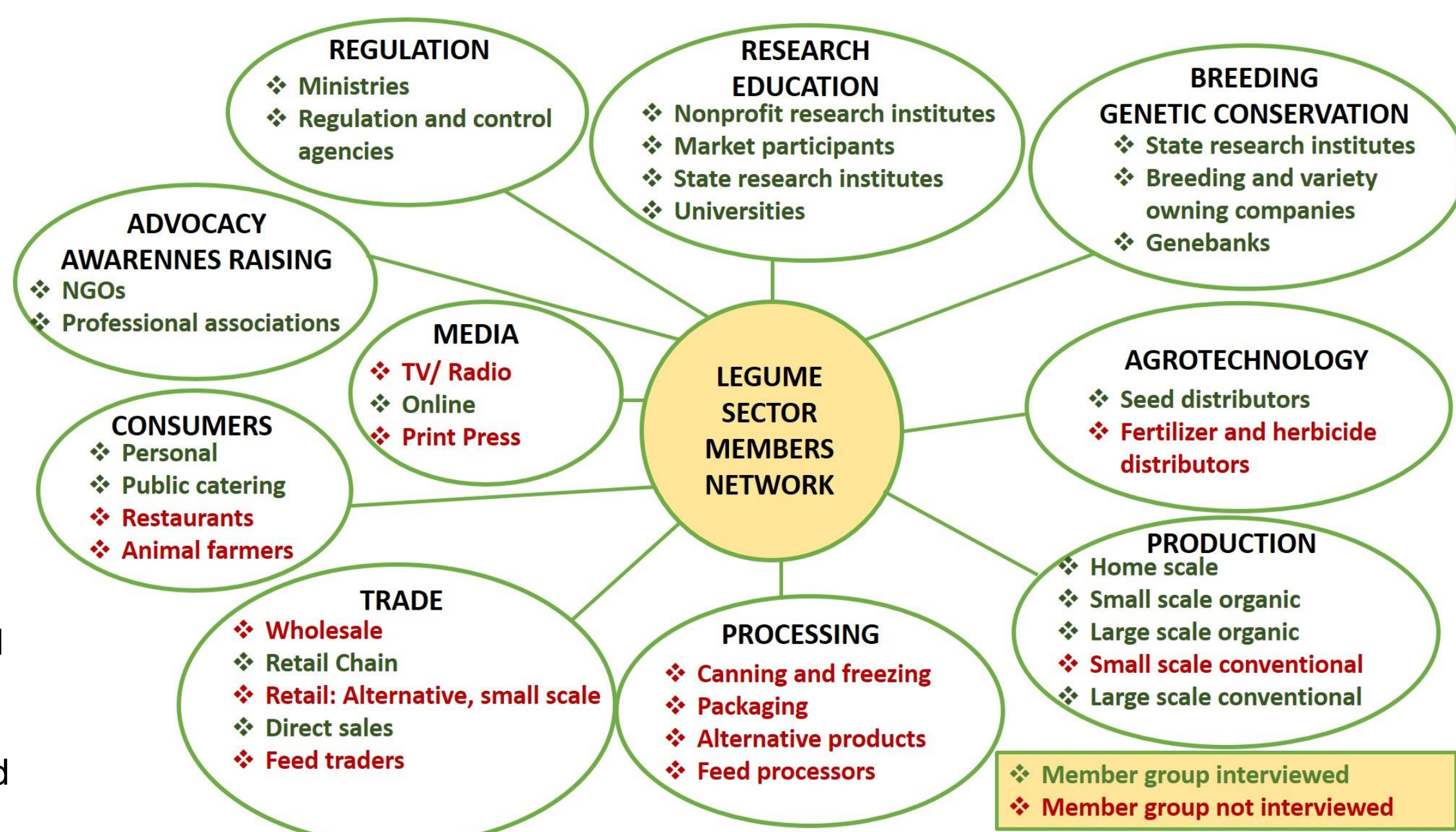
Our qualitative interview analysis of the Hungarian legume sector involved 17 stakeholders in the field. The goal was to gain oversight on the value chain; specifically on the barriers and opportunities present in the sector; on the long term also aiming to strengthen cooperation among members of the value chain. Interviewees were selected from a wide variety of components of the sociotechnical system, such as research, policy, plant breeding, production, public catering and retail. Results show that Hungarian climatic and soil conditions make it possible for a wide variety of legumes to be grown both for human and animal consumption. A good selection of locally adapted varieties and the knowledge for production is present in specialized research institutes for developing production, processing and consumptions of legumes in Hungary. However, currently the sector is not living up to its potential; and in some fields it is even degrading.

## Background

**Research Goals:** The direct goal of the qualitative analysis was to map the situation of legumes in Hungary, including the sectors stakeholders and value chains. Our aim was to get to know barriers and opportunities, the sectors potential for innovation and intervention points in the economic, socio-political, environmental and historical context. The long term goal was to strengthen cooperation between stakeholders and improve the state of legumes in research, production, processing and consumption.

**Methodology:** We conducted 17 semi structured qualitative interviews between October 2017 and January 2018 supplemented with two workshops. Interviewees were selected from a wide variety of the socioethical system with the snowball method, initial participants were identified during workshops and desk research. The semi structured interviews were conducted based on a common guideline, that enabled the interviewees to express their personal opinions besides the role of their organizations in the sector. The guideline for the interviews included questions on the organization and its involvement in the field of legumes; perceived challenges in production, processing and consumption; actors and networks; possible solutions and innovation potential. The conducted interviews were analysed around certain topics in a qualitative way.

## Results: Legume sector members network

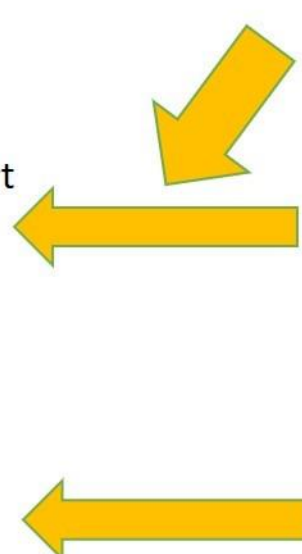


## Results

### Challenges in consumption

- Frozen and canned goods have a stable market
- Low and seasonally varied consumption of dried pulses, market relies heavily on import
- Alternative/ niche markets filled with imported products; low, slowly growing demand
- Public catering: One sided product scale, legumes are underrepresented
- Animal Feed: Besides soy, there are no existent legume value chains; GMO free soy is exported, while soy of unknown origin is imported

Generally: Unhealthy eating habits, consumers disinterested in legumes



- No significant interior production
- Low levels of innovation both in production and processing
- Wholesale is focused on „typical” products (dried beans, lentils)
- Underfinanced and understaffed public catering leaves little room for improvement



### Challenges in the value chain

- Besides some products, there are no working value chains, legumes are excluded from production and processing
- There is a general lack of interest concerning legumes – in production, processing, consumers and policy as well
- Most of the high added value products are imported, consumption of these products is also limited by high price and lack of availability
- The activities of plant breeding, research, education, processing and marketing are fragmented between the members of the value chain

### Innovation potential, opportunities and remaining questions

- Research and development: The fields of breeding and production include committed professionals and institutes with a large knowledge base

#### How can their activities be coordinated?

- Climatic and natural conditions: There is the possibility for a wide range of legumes to be produced in Hungary, genetic material for breeding is available locally and internationally

#### How can old and new varieties be introduced into production?

- Conscious consumption is growing stronger, market channels can be found for locally produced and innovative products

#### How can we address and motivate consumers?



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