

Deliverable 1.2.2.1 The Market Audit.

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January 2005

Published in Roe, E and Murdoch, M 2006 UK Market for Animal Welfare Friendly Products. Market Structure, Survey of Available Products and Quality Assurance Schemes. *Welfare Quality Reports no. 3*

Aim: To identify and study the labels of all the welfare friendly food products available in UK retailers.

Retailers visited:	Fresh 'n' Wild	13.10.04 (Bristol)
	Tesco	13.10.04 (Bristol)
		21.10.04 (Cardiff)
	Marks and Spencers	18.10.04 (Cardiff)
	Coop	19.10.04 (Cardiff)
		20.10.04 (Bristol)
	Waitrose	20.10.04 (Bristol)
	Asda	20.10.04 (Bristol)
	Independent	25.10.04 (Bristol)
	Morrisons	27.10.04 (Bristol)
	Farmers Market	27.10.04 (Bristol)
	Organic Supermarket	27.10.04 (Bristol)
	Sainsbury's	26.10.04 (Cardiff)

Methodology:

The rationale for the methodology was “if you were a UK consumer who wanted to buy welfare-friendly food products, what would you find in UK supermarkets, independent health food/organic stores, and farmers’ markets?”

11 retailers were visited in all. These retailers represent the range of food retail outlets typically available to UK consumers. The survey was carried out in Bristol and Cardiff, two characteristically different cities in South West Britain. It was felt that food retail outlets in the two cities would be stocked to support consumer tastes for an average population base. Within each store products were searched for that explicitly and implicitly marketed a welfare-friendly component within its production.

The Excel spreadsheet (Figure 1) is a record of the findings of this process. All the welfare-friendly food products that were found are itemised in the spreadsheet. Each product is listed with descriptive detail given within these categories:

- Supermarket (where it was bought)
- Product title
- Animal Product (what animal it is derived from)

Brand
Manufacturer
Size
Free-range egg/poultry/pork
Organic
Production Standard Body
Outdoor reared
Quality and welfare (Is food quality tied in with welfare on the packaging?)
Written on package
Farm assurance scheme
Pictures of animals outside (animals on packaging)

The products are sorted firstly by retailer, secondly by free-range and thirdly by organic.

Brief ethnographies of retailer visits.

Asda

On entering the store my eye was immediately caught by the local food chiller. There were cheeses from Somerset etc. but nothing welfare friendly. There was also a big banner saying there were 70 local food products in store. I began my search for welfare friendly food products. Large fresh fish counter, ready-roasted chicken. Nothing. Then turned into the main meat chillers.. beef –nothing, pork –nothing, chicken- I find a Corn fed free range chicken. There were no chicken breasts, fillets etc. of the same type of chicken as I found in other stores. On the end of one aisle I found some pork slices that were made of outdoor reared pigs. I found no more welfare-friendly meat products. It was very hard to locate these two meat products I mentioned. In the dairy aisles there were organic products. However on the packaging there was no mention of animal welfare. However it was possible to buy organic Asda butter, Asda milk and Yeo valley yoghurts. To represent this sector I selected some butter. The egg section had free-range eggs that were RSPCA Freedom Food, BIG British free range eggs and barn eggs. I feel that the reflection of welfare friendly products that were on offer here at Asda represented the best-selling lines nationwide in welfare friendly food products – free range chicken for roasting, free range eggs and outdoor reared bacon.

Somerfield

I had to search for welfare friendly food products, but I found the advertised new range of Freedom Food Chicken. You could buy a whole bird, or chicken pieces. I bought chicken pieces. I looked through the bacon and found some welfare friendly bacon. I didn't find any beef products that were welfare friendly. These welfare friendly meat products were part of Somerfield's So Good range. I found organic milk and organic free-range eggs, and free-range Freedom Food eggs. They had a large range of Organic cheeses with photos of cattle grazing in fields so I bought some of those. Somerfield gave the impression of thinking more than other retailers about providing welfare-friendly food products, but in fact again it was only the three popular lines of chicken, bacon and eggs that were found. I think the discovery of RSPCA freedom food products led to this feeling, The organic range of products was impressive and communicated to me an interest in supplying quality products. The cheeses and the large range of eggs that had welfare friendly components strengthened this impression.

Coop

I looked around the whole store and found nothing except Freedom Food WensleyDale Cheese in the Bristol store I visited. In the Cardiff store we found freedom food gammon slices and organic milk and yoghurt. Coop therefore didn't stock the most popular welfare friendly lines of free range chicken and outdoor reared bacon.

Morrisons

The first welfare friendly food products I came across were the Hipp Organic baby food range. There was no sign of welfare friendly meat in their readymeal or delicatessen or cooked meat counters. The egg section had an impressive range of RSPCA freedom food eggs. Three boxes had the RSPCA production standard label. In addition there were organic eggs. In the fridges of fresh meat it was hard to find any welfare friendly meat products. Although I did find outdoor reared bacon and a free range chicken for roasting. As in the Asda case, there were not any other chicken options. The dairy section had own-brand organic milk and yoghurt plus Yeo Valley organic products. In the drinks section I found Clipper organic hot chocolate powder which advertised its high welfare standards although this wasn't explicit about whether it was humans or animals that were in receipt of these.

Tesco

The impression of Tesco's is immediately that it caters for a large range of purchasing habits. If you want value products you can find those, if you want quality products you can find those all the differentiation is by Tesco's itself in how it segments its own brand into Tesco Value, Tesco and Tesco Finest*. For example, it was the only supermarket where it was possible to buy free range egg fresh pasta as part of their Finest* readymeal range. This is a convenience meal option that is an example of providing quality with an animal-welfare component (Marks and Spencers was the only other retailer with a similar product).

More generally it was possible to find chicken and pork products with a welfare component. There was only one beef product that commented on the grass-fed diet of the animal. When I enquired at the fresh meat counter about welfare-friendly meat in particular the RSPCA Freedom Food range they said that they stopped selling meat under that label because demand was greater than supply so they stopped selling it altogether. The dairy section had some welfare-friendly products. There were some free range eggs. I left with the impression that it was possible to find welfare-friendly products in most sectors of the market. However, the range was limited.

Marks and Spencers

All Marks and Spencers products are own-label. Although we knew that apparently free-range eggs are used in all Marks and Spencers products, this wasn't advertised anywhere.

There was a significant quantity of organic labelled meat (mince, steak, chops etc), which made no explicit reference to animal welfare. This was fresh meat in cellophane. It appeared that animal welfare was only mentioned in the readymeals range as an indicator of quality as much as welfare. There was an uneven-ness in this sector as to what had a welfare component and what didn't. By paying closer attention to the packaging on the meat products, they revealed that some of the products stated

that they came from M&S assured farms, whereas others just came from UK or EU chickens. This was another factor that had an uneven-ness to it. It appeared that within one product range the quality of the meat on sale would vary if one paid close attention to the provenance of the meat. Free range eggs featured in a number of their ready-meals, ready-to-eat product range. Strangely, only Flavoured milk had any mention of animal welfare on its packet. There was nothing about animal welfare on normal or organic milk.

M&S seem to have a conflict going on within their labelling practices about whether they are trying to sell a product on the grounds of the quality of how it was cooked, or on the quality of the raw materials that have gone into the cooking process.

Independent

The independent health/organic store I visited had free range eggs in all their fresh ready-to-eat products. It was hard to find products that weren't organic or with free-range egg. However the range of products was very small and there was a significant amount of vegan alternatives to typically animal-based products, for example mayonnaise.

Fresh 'n' Wild

First we looked in the chillers that stored the 'food to go' aimed at lunchtime buyers, sandwiches etc. There was nothing that obviously used animal welfare as a marketing tool. However on closer inspection of a slice of Spanish tortilla, the ingredients list stated it was made of free-range eggs. The product was made by 'Rachel's Ideas'.

We then moved across to the chiller that stored cheeses. On first looking there appeared nothing. There were lots of local cheeses on sale. However, one type of cheese had a pamphlet accompanying it with the title 'Gloucester Cattle'. In simple, plain packaging there were pieces of single and double Gloucester cheese. On the whole cheese rounds there were green stickers with the head of the cow. The marketing was directed towards drawing attention to the breed of the cows. Alex the cheese man came up and started making conversation with us. We introduced our animal welfare interests and he started to tell us about the particular farm that this cheese came from. The man (whose name and phone number I now have) has 40 cattle. He looks after the herd, and twice a week a lady comes in to make the cheese, because of course he as the farmer cannot make the cheese or milk because of the regulations on dairy production. It is a very small enterprise, in fact when he needs new supplies, often the farmer says his mother is coming into Bristol at the end of the week and could drop some in. Each Fresh 'n' Wild store seeks out local producers, then the company's head office checks the status of the company to ensure food production complies with the food health checks/laws. The Gloucester cheese has PDO status because it can only be made from Cattle from Gloucester. On inspection of the pamphlet there was specific information about the cattle and how they lived and how the farmer's husbandry of them works to make their life better. However the term 'animal welfare' was not used anywhere on the pamphlet.

We then walked around the corner of the cheese cabinet and found all the fresh, chilled meats. There were a vast number of different meat products that had animal welfare components to their marketing strategy. For beef, poultry and pork there were different brands offering products within each category where animal welfare was

prized. In some cases it was organic, it was never quality without organic. See photos of the display, and specific products. Apart from the Organic production standard being used for some of these products, there was no animal welfare production standard in use on packaging.

Next we went to the dairy product counter. There were organic milks, organic yoghurts, puddings and organic eggs. No products except for some of the egg ranges were explicitly welfare-friendly with exception to the dairy products that stressed the quality of the grass the cows ate.

Organic Supermarket

This retail outlet gave the impression of providing a lot of information about their products. When I asked about welfare-friendly products I was immediately told that the Soil Association Organic standard represented higher animal welfare standards. In fact although everything in the store was organic, a limited number of these products were explicit about animal welfare standards. This made this shopping experience rather more ambiguous than in other retail outlets, since it then appeared legitimate, based on the information given by the shop assistants, to buy products labelled organic. None of the fresh organic meat made any reference to animal welfare. The labelling was very basic. I was also told that it cost money to buy the labelling standard and so small, local producers often couldn't afford to buy and use them.

I think it is fair to say that a trip to an Organic Supermarket doesn't mean that it could just as well be a trip into an Animal Welfare friendly zone, because most of the organic products do not play out their animal-welfare friendliness in the products marketing strategy.

Farmers' Market

I approached the Frocester Fayre stall that sold locally produced fresh meat and meat pies. I enquired whether their meat had high animal welfare standards. The response I got was that they didn't farm their animals intensively, so it wasn't intensive farming but due to the nature of the farmland, the pigs were kept inside in barns or old railway carriages with plenty of straw to burrow in. They said that in the summer they had a board with pictures of the livestock on them, but as it was wintry weather now they didn't put the board up these days. They were a member of the assured British pig scheme and also were getting grants for helping to maintain valuable environmental habitats.

I then visited Marshfield organic stall that sold fresh meat products. I discussed with the farmer who was behind the counter about whether the meat was welfare-friendly. He said that they don't shout at the cows but are nice to them. He said they weren't in a farm assurance scheme, but then added that they were with the Soil Association. I picked up their pamphlet and it referred directly to higher animal welfare standards. He added that they can stab the cows, but only twice otherwise they get taken out of organic production for a year.

Sainsbury's

The Market, Pimlico. It was grey inside, loftier ceiling, a number of different counters. However the 'normal' supermarket fare were in aisle's towards the back of the store. There were fresh meat counters but there was no mention of animal welfare

in any of the product descriptions. There were products from the South West (chicken and beef). They had Sainsbury's Taste the Difference joints for cutting. On the meat shelves there were the same range of meat products as I have seen in supermarkets in the southwest. They had RSPCA freedom food southwest chicken. The Southwest regional brand was in use on a number of beef and chicken products. There appeared to be no meat products coming from anywhere else, with exception to Aberdeen Angus. In the Sausage section there were Helen Browning sausages. A large number of meat and dairy products advertised that welfare standards were being met. These are some examples.

'Fully traceable to approved farms that comply with our comprehensive animal welfare and safety requirements.'

"Our cattle roam outdoors throughout the summer and graze on rich grassland. During the winter we house them in large straw bedded barns and feed them conserved grass grown on our land. We have worked in partnership with Sainsbury's for many years to produce the best quality beef we can both be proud of". The Little red Tractor is your assurance that this produce meets the British Farm Standard for food safety, environmental issues and animal welfare. www.littleredtractor.org.uk".

I found no unusual or leading welfare-friendly food products. All the welfare-friendly products had been found previously in other retail outlets e.g. Floyd Maunder Organic chicken had been found in Waitrose.

Overall the entrance had a similar feel to Fresh n Wild, but the products did not directly advertise welfare-friendliness.

Waitrose

On entering Waitrose one immediately comes across the fresh meat counter, behind which is a large banner (3 metres) advertising their free-range pork range. This counter had a large range of free-range pork products.

Free range Hampshire Breed English

Pork Spare ribs	£5.49 /kg
Pork diced leg	£8.99 /kg
Pork fillet	£11.99/kg
Stuffed shoulder	£6.59 /kg
Loin steaks	£10.99/kg
Easy carve leg	£7.99/kg
Pork belly roast	£4.59/kg

There were also 'free-range' sausages available to buy in a quantity to suit the customer. I spoke to the butcher about my interest in welfare-friendly food products. He showed me a large file with information about how the animals that enter meat production for Waitrose have been raised, transported and slaughtered. He said it was possible to trace any meat back to the farm. However nobody had ever wanted to. There was a huge range of welfare-friendly sausages and bacon – Waitrose own brand, independent brands. There were a range of different types of welfare friendly chicken. For example for roasting there was: Waitrose Fresh British corn fed free range chicken; Pullet d'Or traditional free range British chicken; Fresh British Free range chicken; Organic British Chicken.

The beef section had a label displayed on the shelves about its animal welfare standards. It read:

"..from prime quality stock raised by a select group of farmers with whom we have worked for years. Our common aim is to improve all aspects of animal production, care and welfare continuously, resulting in the best quality and tastiest British beef for you, the Waitrose customer, so you can have every confidence in the quality and traceability of our British beef."

In comparison to chicken and pork there isn't a recognised animal-welfare standard associated with beef cattle. It is always 'free range', and so is never mentioned on packaging. The welfare standards advertised for the beef meat on sale, perhaps were connected to the Little Red Tractor farm assurance scheme.

I found free range egg scotch eggs. I found no free range egg pasta. I found free range egg mayonnaise in the sandwiches, as well as free range egg. There was no welfare friendly cheese that I could see. No special pamphlets. The milk refrigerator was very impressive for the range of welfare friendly milks, creams, butters etc. I found some products that had free range egg in them, but not that many. There was a good range of eggs available – not all free range, barn eggs and fresh eggs were there too.

I left with the impression that it was a supermarket that put a lot of effort into offering information to their customers so they could make considered choices about what to buy. Welfare friendly products were explicitly marketed in this way, not as organic or quality as is more often the case in other retail outlets.

Interesting facts from Spreadsheet.

Numbers of welfare-friendly products for each Retailer

- 36 Waitrose
- 16 Organic Supermarket
- 15 Sainsbury
- 15 Tesco
- 12 Marks and Spencers
- 11 Morrisons
- 9 Fresh 'n' Wild
- 8 Independent
- 6 Somerfield
- 4 Asda
- 4 Coop
- 2 Farmers' Market

Products by animal

- 20 egg
- 18 cows
- 18 pork
- 12 chicken
- 7 beef
- 2 beef/pork
- 2 egg/pork

Supermarket Own Brand

- 12 Marks and Spencer
- 16 Waitrose
- 10 Sainsbury
- 9 Tesco
- 8 Morrisons
- 4 Somerfield
- 3 Asda
- 3 Coop

TOTAL 53 out of 139.

Other significant manufacturers

- 4 Yeo Valley Organics
- 4 Denhay Farms Limited

Production Standards

- 60 had no recognised animal welfare standard
- 8 RSPCA
- 63 organic (45 Soil Association)
- 13 little red tractor

Free-range egg/poultry/pork

- 28 Eggs
- 11 Pork
- 10 Chicken
- 1 Egg/beef
- 1 Egg/pork

14 out of 53 organic

31 of these had no production standard.

Total 53 out of 139

9 outdoor reared pork

36 out of 139 of the package descriptions adopted a combined marketing strategy of welfare as a component of quality.

20 out of 139 used a photo or drawing of an animal in the outdoors on the packet.

Discussion

The basic facts drawn from the excel spreadsheet illustrate the complexity and messiness that awaits the consumer seeking animal-welfare friendly food products in the UK. There are two different shopping scenarios within the UK, one where it is difficult to find hardly any welfare-friendly products (Asda, Coop, Morrisons, Somerfield) or the antithesis where there seems to be a large range of welfare friendly products (Sainsbury, Tesco, Marks and Spencers, Waitrose) where the question becomes by what standards are the products produced to? The RSPCA Freedom food standard, the sole animal welfare based marker was scarcely present in the audit. Organic production standards, most predominantly those from the Soil Association are interpreted with positive animal welfare components in some cases on the packaging. The Little Red Tractor or the British Farm Standard was on some

products, but with exception to the product description on some (not all) of the Sainsbury products it was not clear exactly how this could be interpreted as inclusive of higher animal welfare standards. The audit demonstrates that half of the products had no production standard at all.

The findings broadly complement Compassion in World Farming's 2004 report on supermarkets and farm animal welfare, and their placement of the major food supermarkets in the league of welfare-friendly supermarkets. The retailers vary in the degree to which animal welfare is marketed as a component of their own-brand products, the presence of private brand welfare-friendly products or the number of products that implicitly convey animal welfare e.g. organic food. Broadly, I think there are four categories (see Table 1).

Table 1. Four categories of welfare marketing.

Organic, less explicit welfare.	Welfare focused	Quality and welfare	Rare to find welfare
Organic Supermarket, Independents.	Marks and Spencers, Waitrose, Sainsbury, Fresh 'n' Wild.	Tesco, Somerfield, Morrisons	Coop, Asda, Farmer's market

← More organic products found

Less organic →

The type of welfare-friendly food products one finds most frequently available in nearly all of the large food supermarkets are free-range eggs, free-range or outdoor reared bacon/sausages and free-range whole chickens. Additionally organic dairy and meat products are often found, although few of these make any explicit reference to any animal welfare component. It is harder to find welfare-friendly beef, in contrast to the availability of chicken or pork. The descriptive term 'free-range' is successfully used as a marketing term for chicken, egg and also pig production. Free range is associated with better conditions for animals, however in the case of beef people expect the animal to be free-ranging.

Beef

As a consequence of how inappropriate it would be to use the term 'free-range' to convey a different higher welfare production system in the case of beef, the marketing of welfare-friendly beef adopts a different tack often along the lines of diet, living space, and good husbandry.

"Animal welfare conditions are ensured by providing adequate living space and bedding, with access to open pasture (pamphlet)."

"our beef is carefully reared and matured."

"They are fed an organic diet without the routine use of antibiotics."

"Our cattle roam outdoors throughout the summer and graze on rich grassland. During the winter we house them in large straw bedded barns and feed them conserved grass grown on our land."

"predominantly grass-based diet to give a fuller flavour"

Dairy

In the case of dairy cattle, the quality of the pasture is often used to convey a better quality of life for the cow. Cows, as described on many welfare-friendly packet descriptions, are constructed as receiving extra care and attention in a welfare-friendlier production system. There is an absence of welfare-friendly cheese in almost the entire retail field.

“We make it with milk from cows that graze on clover-rich, organic grass.”

“take well to hand milking and make ideal house cows. They have flat lactation curve giving an even production for up to 300 days. This is kind to their udders and helps longevity for which they are renowned, often breeding for 12-15 years”

“Cows that are well cared for and well fed produce outstandingly good milk”.

“all our cows must eat healthily, exercise regularly, no late night movies and no petting behind the barn”

“The cows, who enjoy more space to graze and benefit from natural and homeopathic remedies rather than routine use of antibiotics.”

Pork

Pork is marketed as either free-range or outdoor reared. It is clear on some packages that outdoor reared actually means that they are outdoors when they are young but are put inside as they get older. The increasing visibility of pigs in fields is arguably helping the publicity of this production system within the UK.

Free Range Pigs

“spend their lives outside in family groups and have warm shelters and straw bedding to provide shelter in the winter and shade in the summer”.

“always had continual access to shelters to protect them from adverse weather”.

“Because the pigs are born and reared naturally outdoors to the highest standards you can expect the very best quality meat”

Outdoor Reared Pigs

“made from organic pigs reared outdoors as part of the traditional cycle of mixed farming, helping to build and sustain the natural fertility of the soil.”

“Premium quality outdoor reared.”

“We have selected number of Yorkshire farms where our pigs are reared outdoors with access to open fields and shelter. As they grow, the pigs live in large barns with deep straw bedding”.

Pigs are constructed as family-focused and vulnerable to harsh weather and are thus in need of plenty of bedding and shelter as well as an outdoor, free-ranging lifestyle.

When one compares the three animal species it is interesting to consider how their package descriptions capitalise on particular socio-cultural constructions of nature and farming. We can see this in the success of the descriptive term ‘free-range’. It is a handy, to-the-point, marketing term which encapsulates a strong image that satisfies an appetite for traditional, rural, wild idyllic scenes, successfully used for some time on egg boxes. Perhaps beef is currently disadvantaged (only 7 products found) in marketing it as welfare-friendly because this term cannot be applied. In addition to the

term 'free-range', egg boxes often supply additional description about the hen's lifestyle.

Hens

'Supporting rare breeds in Natural environment. Laid by hens fed on a natural vegetarian, cereal diet. Special, not only for their superior flavour and quality, but because of the poulterer's attention to the health and welfare of his hens, which are free to range and forage on green pasture from dawn to dusk, leading a natural and happy life. Our birds enjoy the finest quality cereal based non-GM vegetarian diet, the privacy of warm secluded nest boxes, trees and shrubs for cover, dustbathe -in fact, everything that a normal healthy hen requires for the freedom of expression and fullness of life, to bring you a truly Free Range Fresh Farm Egg'.

"These eggs come from hens reared on farms approved by the RSPCA Freedom Food scheme. The hens must have the ability to perch, preen, nest, forage and have access to the outdoors during daylight hours".

"Purpose built houses are used, with sun and wind harnessed as a natural energy source whenever possible. These units are moved around the paddock to rotate the pasture in their vicinity. Inside the house natural bedding and scratching materials encourage preening and dust bathing. The hens forage during daylight hours in open organic pastures. The flocks are fed on a natural organic diet containing no artificial yolk colourants".

Chickens

"Specially selected slow growing breed is reared to 81 days in small flocks on selected farms in Southern England. The birds have unlimited daytime access to pastures free from artificial fertilisers and pesticides, and are fed on a cereal based corn rich diet made from non genetically modified ingredients and free from antibiotic growth promoters".

"The Devonshire Red TM is a slow growing chicken that has been specially selected for our West Country Free Range Chicken. They are reared using traditional farming methods on small West Country, family run farms. They have access to tree-planted fields, which encourages them to roam and show natural foraging behavior such as scratching, preening and dust bathing. This allows the chicken to live a fuller, more active and enriched life. The combination of the traditional breed, West Country Free Range farming methods and their natural diet produces tasty, succulent meat rich in flavour".

"This slow growing breed of bird has been specially selected for our Devonshire Gold TM Organic Chicken. The birds are grown for a longer period than standard poultry in a free-range environment on West Country farms. The birds have all year round daylight access to pasture and exhibit normal characteristics such as scratching, preening and dust bathing".

Egg boxes often carry a lot of information about how the free-range system is better for hens. The same is only true for some of the free-range chickens. The chickens for sale in Morrisons and Asda carried no description apart from the label stating free-range.

Packaging

The welfare-friendly food market in the UK appears messy and confusing with lots of different approaches taken by the retailers/manufacturers/producers. To a large extent the variations in how products are marketed, directly reflects the marketing strategy adopted by the retailers in promoting their own-brand product ranges. Private-brand welfare-friendly products tend to be more consistent about providing information (Image 1). The exception to this is the Organic Supermarket and Independent retail sector where local producers often source the products and have not invested hugely in packaging or buying the license to use the recognised production standards. The packaging is often basic and does not directly communicate any animal welfare component (Image 2). Compare Image 2 with Image 3. Image 3 is of Waitrose free range Bacon. Image 4 illustrates how the marketing strategy varies between retailers. Morrison's own-brand free-range chicken carries no additional information.



Image 1 Bacon by Duchy Originals (Sainsbury, Waitrose).



Image 2 Back Bacon in original packaging from Organic Supermarket.



Image 3 Waitrose Free range Bacon



Image 4 Morrisons' Free range chicken

These four products are packaged and marketed very differently. This draws us to consider the increasingly competitive marketing and packaging strategies that the major retailers are involved in. The independent organic supermarket has no influence upon the products that supply its stores. Whereas Waitrose, Morrisons and the other major supermarkets increasingly own significant parts of the vertical meat supply structure and therefore influence how the product is packaged. The number of retailer own-brand meat and dairy products that feature in this market audit is high, over a third. This allows the major retailers to be involved in using their own Brand characteristics to shape the marketing of the product. Duchy Originals are an independent brand that specialises in welfare-friendly meat and dairy products thus it is in their interest to have informative packaging. The independent

producers/manufacturers such as Duchy Originals or Yeo Valley Organic often carry a considerable amount of information that is only available to the customer once they have made the purchase, i.e. it is found on the underside of the cardboard label. This is a particular marketing strategy that seeks to communicate to the consumer in a more intimate, specialised channel after the product has been bought.

Retailer Own-brand Market Segmentation.

The ultimate own-brand retailer is Marks and Spencer's. The UK based supermarket food retailer pioneered own-label food. Following in the success of the St Michael brand, other large supermarket chains have created their own brands although never succeeding to hold the same high level quality position that Marks and Spencers enjoys.

‘Supermarkets love the idea of building up default loyalty to their brand, a kneejerk responses that doesn't enquire too much about where the product comes from and how it was produced: a ‘take our word for it’ concept of quality’ (Blythman 262-3: 2004)

In the last couple of years some of the major retailers (Tesco, Asda, Morrisons, Sainsbury's) have moved away from a sole focus on price-fighting own-brand ranges. Instead “‘product-tiering’ its whole own-label offering into high-quality, standard and price-fighting ranges, ‘taking quality out at all levels’. This process is otherwise known as ‘value engineering’, an industry term for looking at ways to use cheaper ingredients (Blythman 2004). The products found in our study that were branded ‘own label’ were found within a range of different quality categories.

For example:

Asda Organic

Coop Organic

Coop Premium

M&S cook!™

Marks and Spencers Continental

M&S ready to roast

Morrisons Organic

Tesco Organic

Tesco Finest*

Sainsbury's Taste the Difference

Sainsbury's Organic

Waitrose

Waitrose Select farm

Waitrose Organic

The retailers tailor their marketing and packaging strategies for the own-label products to suit their own brand. ‘The brand emerges as the organisation of a set of relations between products or services’ (Lury 2004:26). The brand organises the exchange between producers, retailers and consumers. Some supermarket and independent brands choose to make the political and ethical intervention to provide detailed information about what a better life for animals consists of, or to just mention it as a concern in the production of their food. The reasons for variations in this strategy are variations in the consistency of different retailer brands, some want to reflect an openness and acknowledgement that their consumers want to be informed, whereas others respect/create consumers that do not want to know. Those retailers

that just use 'free-range' as a marketing label and do not provide any further details do that because it is part of their brand strategy; these brands create a low information identity, attractive to some consumers, unattractive to others.

The widespread use of the term animal welfare on a large number of Sainsbury's own-brand dairy and meat products can be understood as an important component of the Sainsbury brand. The brand communicates directly about the provenance of the food they sell. Whereas many of the other supermarkets e.g. Tesco, Somerfield, Asda, and Morrisons choose to communicate 'you can trust us' to the consumers by the strength of the brand without a lengthy blurb about the production values associated with the Little Red Tractor label. Understanding how the brand structures relations and thus practical behaviour and discourse around products leads Celia Lury to understand brands as performative (2004). Brands are active agents in the relations that are made and remade between consumers and producers, and increasingly the relations between consumers and retailers as the own-brand movement displaces the visibility of the independent producer, contracted to a retailer, in the food network. Thus the huge variation and complexity in how welfare is communicated to consumers is a reflection on the number of different brands, independent and retailer-brand, operating within the welfare-friendly market.

Drawing a connection between the farm assurance scheme, the production standard and the description on the packet of many of these products is difficult. Since only half have a recognised production standard mark, the other half could be accused of being opportunistic rather than wholly honest. Which leads to the thought that while some are being opportunistic another significant proportion that may well meet the same production standard choose not to market the welfare-friendliness of the product, choosing to focus on something else. Or another explanation is that the paucity of products that carried a recognised high animal welfare production standard (RSPCA freedom food, organic) reflects that the use of the term animal welfare, free-range or outdoor reared are applied to a range of actual levels of animal welfare. It is not clear to the consumer how some of these products that advertise a welfare-friendly component map onto recognised welfare standards.

A large number of meat products do not feature in this audit because on the packaging the quality of the cooking or the eating experience is used as a marketing tool as opposed to the life of the animal from which the meat came. Within some product lines there seemed a random pattern between meat products that carried writing on the package which mentioned welfare and those that did not. Are retailers divided, confused, unsure as to whether animal welfare is a viable marketing tool? It certainly is apparent that for the overwhelming majority of meat products if there is a product description, it is more often quality rather than animal welfare that comes first. Although of course there are exceptions, most notably Waitrose.

Conclusion

The market audit for welfare-friendly food products has revealed a complex, disaggregated market. Own-brand free-range eggs, chicken and bacon are almost standard fare across the major supermarket food retailers. There are a small number of independent brands that have coverage across more than one retailer. Understanding the aims of the retailer own-brand marketing strategies would appear to provide

answers for how the own-brand sector markets their products so differently within retailer brands and between retailers, and thus communicate different levels of information about animal-welfare or the mere inclusion of welfare-friendly products. The other major finding of the audit has been the number of products that make a welfare claim but which carry no recognised production standard. Overall the market for welfare-friendly food products in the market is a confusion of unclear welfare standards communicated through package description rather than recognised standards. For example, the successful use of the familiar marketing terms like ‘free-range’ to differentiate products with higher standards for chicken and pork, but not beef or dairy. The blurring of quality, organic and welfare is difficult to disentangle. A few products explicitly call on all three quality, organic and welfare to market products. Some organic products talk about quality but do not mention welfare. Whereas non-organic products in some cases draw on the language of quality and welfare but many products that are marketed as a quality product make no mention of welfare (these do not feature in the audit). What was included and what was not included in the study carries a level of ambiguity but this is significant as it illustrates the major impression that the audit left with those involved. If one looked for welfare-friendly food products in the UK food retail market one certainly found some, but these represented the minority in a vast market of meat and dairy products that carried competing marketing agendas primarily on the lines of value or quality and not animal welfare.