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Science and society improving animal welfare

Welfare Quality Reports No. 7

Consumption, Distribution and Production of Farm Animal Welfare

edited by
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September 2008

The present study is part of the Welfare Quality® research project which has been co-financed by the European Commission, within the 6th Framework Programme, contract No. FOOD-CT-2004-506508. The text represents the authors' views and does not necessarily represent a position of the Commission who will not be liable for the use made of such information.

Typeset by Joek Roex, Cardiff.
Printed in England by MPG Biddles Ltd, King's Lynn, Norfolk.

ISBN 1-902647-78-5
ISSN 1749-5164

CONTENTS

PREFACE

This Welfare Quality Report presents further findings from surveys carried out in seven countries (France, Italy, the Netherlands, Norway, Sweden, the United Kingdom and Hungary). It brings together work from three work packages during 2005, and as such is the final installment in a triptych that includes previously published Welfare Quality Reports Nos 1 and 2. Part I of this report describes the methodology and results from the public opinion surveys that were carried out among consumers in seven countries. It includes the process of preparing the items in the survey, the development of the final questionnaire, the sampling and weighting procedures, and evaluations of the validity of the results. It focuses on some key questions about consumer interests in animal welfare and how that is reflected in their practices. Part II reports on the practices of retailers and within supply chain with regard to the current and potential market for welfare-friendly food. Part III reports on the attitudes, beliefs and behaviour of cattle farmers concerning animal welfare.

Part I of this report has been collated and written by Unni Kjærnes and Randi Lavik, National Institute for Consumer Research, Norway. Two of the chapters have been co-authored by additional contributors: Henric Barkman (Chapter 6) and Eivind Jacobsen (Chapter 7). Some sections of Chapters 1 and 2 have been published in different form in Welfare Quality Report no. 2. They have been included here since they serve as introductions to the subsequent analyses.

The authors and collators of Part II are Emma Roe and Marc Higgin, Southampton University and Cardiff University, United Kingdom. They would like to acknowledge their thanks to Lynda Ertl, Southampton University, for designing the diagrams in Part II. They would also like to thank their colleagues in Work Package 1.2 for their invaluable contributions:

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Part III has been written and collated by Bettina Bock and Marjolein van Huik, Wageningen University, the Netherlands. They would like to thank their colleagues in Work Package 1.3 for their individual contributions:

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A. Menghi, A. Gastaldo, K. de Roest, P. Rossi (*Italy*)
C. Hubbard, M.A. Bourlakis, G. Garrod (*United Kongdom*)
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September 2008

Part I

Opinions on Animal Welfare and Food Consumption in Seven European Countries

by

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Work Package 1.1
EU Food-CT-2004-506508

1

INTRODUCTION TO PART I

1.1 THE OBJECTIVES OF THE POPULATION SURVEY

Work package 1.1 is meant to provide detailed and context-relevant knowledge about consumer requirements regarding animal friendly products, e.g. availability and information on labels in seven European countries. This is meant to enable the identification of shared and country specific consumer demands. The findings will feed into an information system on animal welfare (Sub-project 4). The selected countries, France, Hungary, Italy, the Netherlands, Norway, Sweden and the UK, represent varied conditions in terms of food supply, consumer expectations and trust in public and private actors animal-based food chains. Opinions will be linked directly to the supply of welfare products and the information systems on them within each country. Public opinions and expectations will also be compared to perceptions and concepts applied in scientific assessment and monitoring programs for animal welfare, as well as with those retailers and farmers.

The populations survey has mapped purchasing patterns and opinions about welfare-friendly products in seven countries. Analysing and identifying problems and obstacles as seen from the consumers' point of view was meant to improve our understanding of the extent and variations of these phenomena in European populations. The chosen method was therefore nationwide and representative population surveys in the selected countries.

The specific objectives have been:

- to identify current purchasing patterns with regard to welfare-friendly food products in various European countries;
- to identify variations in consumer responses to animal welfare issues in terms of concern, responsibility, eating and purchasing, and collective mobilization;
- to determine whether the demand for information on farm animal welfare among consumers is adequately met in terms of contents, format and information sources;
- to assess consumers' opinions about and trust in information sources and different labels;
- to identify problems and obstacles in purchasing patterns and opinions about animal-friendly products in various European countries.

- to investigate the main barriers to purchasing food products produced at higher welfare standards, including availability, price, product characteristics, information, consumer opinions and trust.

Labelling and information has been a key issue in the consumer studies. Originally, the idea was to focus on particular labels in the survey. However, the reviews (Roex and Miele, 2005) and market audits (WP 1.2) revealed that there are large numbers of relevant labels in some countries (too many to be included in a survey), while there are indeed very few in other countries (making preferences between labels of little relevance). Therefore, questions on labels and information had to be formulated in more general terms, while more specific labels are addressed elsewhere in the project.

The formulation of the questionnaire and, in particular, the analysis of the survey data, requires contextual information. Examples are definitions of welfare related items, the supply of welfare-friendly food products in the countries involved, including distribution channels, and existing information systems on the welfare of farm animals. This has been provided through earlier tasks in WP 1.1 as well as in WPs 1.2 and 1.3.

1.2 THE BACKGROUND

The aims of accommodating societal concerns and market demands mean that we need to know what these concerns and demands are (Blokhuis et al., (2003). The project partners have made initial reviews of consumer concerns, labels and retailer initiatives, as well as producer-led schemes. The reviews, which were conducted in six countries (France, the United Kingdom, Italy, the Netherlands, Norway, and Sweden), indicate that in most of the countries, there are a limited number of labels dealing specifically with farm animal welfare. Animal welfare is however often included as an element of labels linked to organic production, better-quality foods, etc. Institutional contexts (i.e. market structure, regulatory framework and collective consumer mobilization) vary considerably, affecting the supply as well as the consumer role. This is important to consider when we study public opinions and consumption practices.

Consumer Concern and Responsibility on the Agenda

In general, awareness about animal welfare seems to have increased since the early 1990s and is currently an issue of importance to most Europeans (i.e. Bennett, 1995, 1997; Hughes, 1995; Magnusson et al., 2001; Miele and Parisi, 2001; Bennett and Blaney, 2002; Berg, 2002; Beekman et al., 2004). An important awakening factor has been the various scandals involving the meat sector and debates in the mass media, followed by an increasing amount of legislation to improve the welfare of farm animals within the EU.

However, social mobilization is most often reflected in more traditional political activities, such as a growing support of animal rights/welfare groups. Consumer concerns have not yet generated new and significant product developments or demands, except perhaps in the UK (e.g. UK Department for Environment, Food and Rural Affairs (2004) and M&S free-range eggs policy).

Animal welfare is now an issue on the public agenda throughout Europe, not only associated with food scandals but also with a growing concern with the methods and procedures of industrialized food production and a call for stricter regulation of welfare in animal production. References to 'the consumer' appear in public debates and in collective mobilization, demanding foods that have been produced in a more animal-friendly way than in conventional agriculture.

Recent studies of Harper and Henson (2000, 2001) revealed that 77 per cent of Irish consumers claimed to select animal-friendly alternatives, with 70 per cent, 64 per cent, 53 per cent and 38 per cent making similar claims in Germany, France, the UK and Italy, respectively. Among Norwegian consumers, 38 per cent had 'consciously declined to buy certain foods because they suspected unacceptable animal welfare' (Berg, 2002). These data do not correspond to the actual size of the market for 'animal-friendly' food in Europe. There is, in fact, limited availability of the products in mainstream shopping outlets, e.g. supermarkets, and insufficient information (labelling) restricting the opportunities for consumers to choose 'animal-friendly' foods.

The project 'Consumer Concerns about Animal Welfare and the Impact on Food Choice' revealed that people were spontaneously concerned about food safety, health and quality rather than animal welfare. Many were willing to pay more for animal welfare-friendly products but stated that the products would need other improved qualities (e.g. taste) as well. Even though the respondents claimed that they had reduced or substituted consumption due to animal welfare considerations, this claim is not substantiated by market figures. The most important barriers to purchasing 'animal-friendly' products were lack of information and availability. The project concludes that consumer concerns about animal welfare is multi-dimensional, and not alone enough to motivate consumers to purchase 'animal-friendly' products (Miele, in Kjørstad, 2004).

The special issue of *Eurobarometer*, 'Attitudes of Consumers towards the Welfare of Farmed Animals' (conducted in April 2005, European Commission, 2005) reveals distinctive differences between the 25 European member countries regarding animal welfare and protection. Explanations of these differences could be variations in both production methods and purchasing power – which again might be the sources of country variations regarding levels of awareness and attitudes towards animal welfare. Overall the welfare and protection of farm animals in the EU is believed to be superior to other parts of the world, although the new EU members and some southern states seem less convinced. However, these animal welfare concerns do not seem to be accounted for when shopping for food. But there are some significant country variations in this respect. New member states seem to focus the least on animal welfare when shopping. Identification of animal welfare-friendly production systems is difficult in general, although North European countries are generally better off in this respect and hence more attentive towards ani-mal welfare. Despite their trouble with recognizing welfare-friendly products, three quarters of EU citizens believe in their own capacity to influence the welfare of farmed animals through their purchases. In addition, most people seem willing to pay more for welfare-friendly products, e.g. eggs. This is not so much the case in the Southern Europe and in the new member states (European Commission, 2005).

What these studies indicate is a widespread, albeit variable, interest in farm animal welfare issues. Many also see the relevance of animal welfare within the context of food purchases, but this is not translated into any substantial demand for particular welfare-friendly products. Awareness of animal welfare is not the only issue reflecting criticism towards contemporary farming methods and meat production. Many people are sceptical towards meat consumption referring to a range of topics, like safety and environmental issues as well as basic problems of eating foods that involve killing animals (e.g. Guzmán and Kjærnes, 1998; Jacobsen, 2001; Miele and Parisi, 2001; Szatek, 2001; Velde et al., 2001; Magnusson and Koivisto Hursti, 2002; Beekman et al., 2003, 2004; Verhue et al., 2003). Scepticism may be reflected in changes in demand, but not all the time and in every case. Consumption statistics show significant drops following the BSE crisis in Italy, France and the UK, particularly for beef. Even though increasing concerns were observed even in countries like Sweden, the Netherlands and Norway, there were no clear drops in demand (Kjørstad, 2004). Comparative studies indicate that trust in actors in the food sector may at least in part explain these differences (Miele and Parisi, 2001; Poppe and Kjærnes, 2003). Even where changes did occur after the BSE crisis, these short-term shifts rarely translated into long-term trends. Habits are not easily changed, eating and shopping for food are subject to considerable routinization, and processes of change usually take considerable time and will be influenced by a number of factors.

In relation to the issue of farm animal welfare, people are not only buyers of food. They are also citizens and they are eaters of food. These varying roles imply different considerations and capacities, and they refer to quite different contexts. As costumers, people relate to retailers of various kinds and to the food industry. Within this context, farm animal welfare is transformed into an aspect or issue of food items that may or may not be considered when shopping for food. As citizens, people will refer to political and governmental institutions, to the media and to various forms of social mobilization. As a social and political issue, farm animal welfare will be a matter of treatment of animals, which can be regulated and influenced in many different ways. Third, and importantly, eating food means sharing meals with family and friends, which also involves strong culinary traditions. Cooking and serving food is subject a socially formed division of labour, within the household as well as between the household and other societal institutions. It also means ingesting foods that will affect your body. Eating is highly normatively regulated and food items are subject to complex processes of classification. To the eater, the origins as live animals can be both distant and quite problematic. There are sets of strong norms and values associated with the relations between humans and animals, how animals can be used for food, and limitations regarding what is considered edible. The strong social and normative regulation of such issues implies that they must be expected to vary across time and cultures.

Food consumption is a matter of strongly routinized sets of practices, in which these various roles and capacities are included and thus also highly interrelated. Food consumption activities are elements of our – often very mundane – everyday life. Consumption practices can be subject to serious reflection, but very often they are tacit and taken for granted instead. In trying to understand what people do and why they do it, this is very important. Considerations for animals and animal welfare may or may not be included in these practices, as a conscious reflection or just being a matter of routine. Buying free-range eggs, for example, may be part of a normalized practice that is not reconsidered upon each act of purchase. It is just what you normally do when buying eggs. Seen within this perspective, assumptions about motivations and stated preferences preceding and causing a certain kind of practice can be problematic.

Consumer Choice Requires Alternatives

For several reasons, animals' welfare conditions can also be kept out of the domain of food consumption. Buying particular welfare-friendly food items rather than conventional ones presumes a market that differentiates on these aspects. Choices must be available and there must be sufficient information about these choices. And the alternatives must be acceptable in terms of price, safety, quality, etc. That is not always the case. Availability of 'animal-friendly products' and adequate information about them are required in order to satisfy a consumer demand. The diversity of production and distribution systems and of initiatives for the improvement of animal welfare may influence consumers' roles, options and expectations. Currently, there is little knowledge about how configurations of supply and communication are connected to (i.e. are influencing and being influenced by) consumer attitudes and demand for 'animal friendly' food products.

As buyers of food, people have to rely on the evaluations and goodwill of actors in the food supply chain (Kjærnes, 1999), but studies indicate retailers, processors, producers and public institutions are not always trusted to provide reliable information and goods meeting expectations. However, trust in institutional actors varies considerably between countries, more than between population groups, so the relation between consumer demand and information is complex and depends greatly on institutional and cultural conditions within each country.

People usually do their everyday food shopping in a very routine way, making detailed and complex information hard to process and often also of little relevance. This has opened the way for an abundance of simplified labelling schemes, often relying solely on symbols – indicating nutritional value, eco-labels, place of origin, etc. This simplification and standardization, with a background that is often abstract and difficult to apprehend, makes trust in the institutions that produce and monitor crucial. Trust is hard to build and may deteriorate very rapidly. Trustworthiness is associated with long-term reputation, but also, perhaps increasingly, with the system behind the label in terms of quality assurance and audit schemes, transparency, and third party monitoring. There is little knowledge about the implications of these underlying systems on perceptions and demands.

There may be several reasons for farm animal welfare not being important when purchasing food, despite interests and concerns. One alternative situation to one of market differentiation is that welfare conditions are regulated through other means, like legislation that implies high welfare standards. People may consider their role as a citizen in other arenas than the market as more relevant and important. Or the various market actors may not see farm animal welfare as a competitive issue upon which they want to differentiate. There will then be few options to select from. We also know that people can be ambivalent about eating foods of animal origin. It may be difficult to associate live animals with ingesting meat. Leaving meats out of the diet altogether or not eating particular types of meat occurs quite frequently in some countries, while this seems less problematic in other countries.

But the opposite may as well occur, where people make use of their purchases to express their citizen concerns. In several cases, we have seen that claims for improved farm animal welfare have been framed as consumer issues and also that this has been acted upon when shopping for food. In that way, food consumption can be an important source of innovation in the treatment of farm animals. The importance and impacts of these different roles will depend on the specific political and institutional conditions, including the structure of the food chain, the regulatory arrangements, and collective mobilization. Animal welfare as a social problem on the public agenda in Sweden is not the same as in the UK. Shopping for food in Hungary is not the same as shopping for food in the Netherlands. And it is not the same to shop for eggs as for beef. Food preparation and meals are quite different in Italy and in Norway. Moreover, the food sector is changing rapidly. In some countries, welfare schemes, initiated by a number of different actors, have come up as an important element of changes. Such schemes may, for example, represent a potential source of increased income for farmers or they may constitute an element in how big supermarket chains build up confidence in their own-label strategy and corporate social responsibility. When exploring animal welfare and food consumption practices, we must, therefore, consider the various aspects of these practices and the particular contexts in which they have been formed. The Welfare Quality® project offers very good opportunities for investigating this. The population survey is meant to provide one element, by investigating the patterns of food consumption across Europe, and the role and relevance of farm animal welfare in these practices.

1.3 THE STRUCTURE OF PART I

The next chapter of this report will give a detailed presentation and discussion of the methodology used in data collection. The chapter will also present a discussion of the validity and reliability of the results, based largely on input provided in the survey reports submitted by each country team. The statistical methods used for the various analyses are described in association with the presentation of the data and the analyses.

Five chapters present different research questions posed to the survey data. First, Chapter 3 gives an overview of central data in the survey. Chapter 4 addresses some basic issues of bringing live animals closer together with the practices of purchasing and eating food. Chapter 5 focuses on the background for the demands for information on animal welfare that are expressed in the survey. Chapter 6 presents an analysis of how animal welfare issues are involved in political consumerism, while Chapter 7 discusses the marketing of welfare-friendly food as a case of innovation.

In Chapter 8, we return to the research questions posed initially and discuss them in view of the results and the analyses presented in Part I.

2

DESIGN AND METHODOLOGY

2.1 INTRODUCTION

This section deals with methodological questions related to a quantitative survey of public opinions on farm animal welfare and how those opinions are linked to purchasing practices.

General methodological considerations in designing the survey were to ensure:

- high quality, reliability and comparability of the results;
- sampling methods and response rates that could give sufficient representativity;
- validity of the questionnaire; and
- high cost-effectiveness of the total process.

Carrying out comparable population surveys in seven countries is a highly complex task. We will give an overview of the design and data collection process. We will also discuss some validity problems encountered regarding some of the questions.

In Section 2.2, we will discuss the planning and design of data collection procedures. The section deals with the choice of method, i.e. telephone interviews, for the survey, items to be covered and the design of the questionnaire, criteria for selecting the poll institute, and the evaluation of the pilot interviews. Section 2.3 describes the sampling method, the weighting procedures, and evaluation of the representativity. In Section 2.4, some important issues are raised regarding the validity of some of the questions from the survey.

Appendix 1 presents the specifications that were presented in the call for tender for sub-contractors. Appendix 2 presents, first, the questionnaire in English and, second, the instructions to interviewers.

2.2 THE PLANNING AND DESIGN OF DATA COLLECTION

2.2.1 Why a Telephone Survey?

There are several social scientific methods for collecting quantitative data on opinions and practices. Traditionally, surveys have been implemented by *mail questionnaires*, *face-to-face interviews*, and *telephone interviews*. New methods for conducting surveys include *interactive voice response* (IVR) and *Internet surveys* (web) (Dillman et al., 2001). In the interactive voice response survey, the stimulus is aural, but the question is pre-recorded, and the respondent's answer is not given to a real person. There is still insufficient experience with this method, and it was regarded as too risky for this survey. A web solution was not considered at all, because the availability of Internet is not sufficiently widespread yet for ordinary consumers. Turning to conventional methods, questionnaires by mail were rejected, first of all because of the risk of low response rates. It is also overall rather time consuming. Face-to-face interviews were considered and might have been a serious option for the data collection. Face-to-face interviews can give high response rates and good quality data. When this was rejected too, the reasons were time-use and costs. This kind of interviewing normally takes a long time to conduct. They are also relatively expensive and would have been too costly, considering the sample sizes that we needed for statistical reasons.

Telephone interviews where the method of choice, because of time efficiency and an acceptable level of costs. Telephone interviews have some disadvantages; the questions have to be precoded, there are few possibilities for spontaneous answers, and the questionnaire cannot be too long. However, one important advantage with this kind of survey is the possibility of closely controlling the data collection, including monitoring of the actual interviews. This was especially important for ensuring comparability, since the survey was conducted in seven very different countries.

Data were collected through a CATI survey, i.e. computer-assisted telephone interviews, conducted by TNS Global. This provides standardized, monitored interviews. The whole interview is not supposed to exceed 20 minutes, including the introduction of the theme. Considering the number of countries, the relatively large total sample size, and the length of the interviews, it was unfeasible to include open-ended questions. That would also have required extensive resources for codification and preparation of the data files for quantitative analyses.

2.2.2 Call to Tender

A call to tender was sent out by Cardiff University (see Appendix 1). Several requirements had to be met by the chosen polling agency. In order to select the best offer, information should include cost estimates for different sample sizes and timeframes, procedures to ensure high quality data, like monitoring and quality assurance procedures, sampling and response rates, specification of partners in all countries, etc.[1] The tendering process was organized in accordance with EU regulations for subcontracting.

It was emphasized that all requirements in the specification should be met, including the ability to:

- demonstrate appropriate previous experience with CATI surveys;
- demonstrate appropriate previous experience with cross-country population surveys (examples required);
- demonstrate appropriate previous experience with contracts made for social scientific research projects (references, contact persons required);
- demonstrate established collaboration, including management and communication procedures with affiliate polling institutes in the selected countries (examples required); and
- demonstrate a track record of very high quality and good management in this type of study.

The offer needed to comply with all the procedural requirements in the specification. All other criteria being satisfactory, price would be decisive.

Six agencies had delivered an offer on the closing date. The agencies were evaluated according to management/communication, experience, quality assurance schemes, timing, sampling procedure, and costs. Based on an assessment of which company could best meet all these requirements, TNS Global was selected. One additional benefit was that TNS had affiliates in all the countries included in the survey. TNS UK managed and coordinated the survey.

2.2.3 Items Included in the Survey Questionnaire

Ahead of the quantitative survey, focus group interviews were conducted in all seven countries (see Evans and Miele, 2007). The experience from these group interviews was very useful when developing the survey questionnaire. The work on developing the questionnaire started in February 2005. In April 2005, potential dimensions to be included in the questionnaire were presented and discussed at a meeting with the teams involved in Work Package 1.1.

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[1] Ref. no. Spec161/Welfare/SH/0605.

Seven main items were included.

Consumption practices, eating and shopping

- Frequencies of eating different products.
- Vegetarianism.
- Eating preferences – likes and dislikes – culinary specialities/aversions (frogs, game, etc.).
- Shopping practice, where the products are bought (gives a picture of the retail structure in each country).
- Important parameters when buying specific products (choose a few products).
- Important parameters for organic products.

Information

- Demand for information on farm animal welfare.
- The type of information preferred, labelling and other forms.
- The preferred source of information.

Knowledge and experience with animals

- Experience with farm animals and visits to farms.

Concerns regarding animal welfare, uncertainty and dilemmas

- General question: how important is the issue of farm animal welfare for you?
- Importance of various aspects of animal welfare.
- Perceptions of farm animals welfare in your own country compared to other European countries.
- Perception of farm animals welfare in the past compared to now.
- Perception of what farm animal welfare can affect (like human health, taste of the product, production volume, illness, etc.).
- Attitudes towards animals.

Relational aspects of farm animal welfare: trust and division of responsibility

- Trustworthiness of information about farm animal welfare from various institutional actors.
- Who should be responsible for farm animals welfare.

Consumer agency and mobilization

- Food consumption and consumer activism.
- Do people have influence as consumers.

Background variables

- Age.
- Gender.
- Education.
- Occupational descriptions.
- Income.
- Place of residence.
- Region.
- Household composition (number of children, marital status).
- Religion (which religion and frequency of attending religious services).

Considering the overall research questions of Welfare Quality and the consumer study, several additional items were discussed, such as more detailed questions on labelling, willingness to pay, and attitudes towards the expert's 10 principles of animal welfare.[2] These questions were included in the first versions of the questionnaire, some even in the questionnaire that was piloted. They were dropped because of the length of the questionnaire (some require lengthy batteries of questions in order to be reliable) and because some of them were not fea-sible in a telephone survey (like views on the experts' principles).

2.2.4 Translation and Piloting

After the initial discussion of items to be included, a full questionnaire was drafted. This draft was then translated. The translation process included several stages. The master questionnaire was developed in English. Professionals made the first translation into the respective languages (Dutch, French, Hungarian, Italian, Norwegian, Swedish – minority languages were not included). It was then back-translated, and, last, checks were made by project partners or other competent contact persons. The questionnaires from the different countries were all confirmed by SIFO, prior to running the pilots.

It is difficult to formulate good and simple precoded knowledge questions about animal welfare in different countries where the context and people's experiences are very different. Moreover, the maximum length of 20 minutes made the prioritization of questions a key issue. Pilot interviews were conducted to ensure that questions are understood (in the respective languages), to get an impression of how the whole questionnaire structure works, and to check the length of the interview. Twenty-five pilot interviews were conducted in each country.

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[2] The 10 principes of animal welfare: 1) no prolonged hunger or malnutrition, 2) no prolonged thirst, 3) physical comfort, 4) good health (no injury), 5) good health (no disease), 6) absence of intense or prolonged pain (not caused by injury or disease), 7) possibilities to express normal/natural behaviours (social behaviour,) 8) possibility to express normal/natural behaviours (other than social behaviour), 9) absence of negative emotions in relation to humans, 10) absence of negative emotions in relation to other animals.

Due to good interviewer feedback, the piloting proved very useful for developing the final questionnaire. The evaluation of the pilot interviews revealed many problems we had to solve. The length was a challenge all along. Some questions regarding purchasing were considered repetitive and boring for the respondents to answer. These questions were reduced in number. Some constructs or words were not clear enough for the respondents. Bacon and ham are not common in all countries; we had to change to bacon and/or ham. Distinctions between eggs from free-range chicken indoors or outdoors were too complicated; we had to put them into one category: free range.

Some questions had little meaning for the respondents. This was the case for questions about labelling and other information, probably because many had little previous experience. The most difficult question for the respondents to understand was related to the scientific animal welfare principles: 'Experts on animal welfare have formed some principles that are important for farm animal welfare. How important or not are the following principles for you?' – mentioning the 10 expert-based principles. Most of the countries reported that these questions were seen as peculiar and not understandable, causing confusion and uncertainty throughout the piloting, both among the respondents and the interviewers. It seems very difficult for people, first, to think that these are evaluations made by experts and, next, to assess issues that many have never thought about. Results from these questions would be too unpredictable and very complicated to interpret, especially as this is a comparative analysis. The validity would have been poor. It does not mean that these issues as such are left out, as most of them have also been covered elsewhere in the questionnaire. As the link to experts is strongly emphasized in the focus group interviews, this is also a point where it is urgent to combine the two different types of data.

Another problem was the income question. We decided to ask for the household's monthly net income, as taxes vary quite a lot between countries. We also decided to ask for the exact amount (circa). If they did not or were unable to answer, the respondents were presented with brackets for particular income ranges. D7 became a question with some adjustments – hoping that most of the respondents would answer the unprompted question D6 (see Appendix 2).

Several countries had problems with the concept 'farm animal'. In Norway, there is a clear concept, which is 'husdyr'. However, this was misunderstood by the respondents, because they also included pets in this term. We had to construct a new word, which is not officially correct, but it was understood by the respondents, and that was 'landbruksdyr'. Sweden (used 'lantgårdsdjur') and the Netherlands (used 'boerderijdieren') encountered similar problems, which were solved in the same way as in Norway.

2.3 SAMPLING[3]

2.3.1 The Sampling Process

The TNS affiliate in each country was responsible for sourcing its own sampling frame. In each country, national directories were used to source telephone numbers. In all cases, except for Norway where the sampling frame included mobile phones, only landline telephone numbers were listed. The directories were used to build a representative sample of households in terms of national geographic variables: region, city/town size or post codes.

A probability sampling technique was selected. Although potentially difficult to execute, it requires time, resources and careful management, this technique supports the need to project survey results onto the wider population of each country. The probability technique adopted for this survey was a random sample with a systematic approach to participant selection.

Numbers were selected randomly, using Random Digit Dialling (RDD)[4] and the respondents were selected using the systematic approach known as ‘the first birthday rule’.[5] The simplest way of applying this rule involves asking to speak with an eligible person (aged 18–80 years) in the household with the first birthday following the point of contact. In an attempt to save time and minimise introductory questions, TNS used a variation of this traditional first birth-day rule.

About 1500 respondents in each country were randomly selected, aged between 18 and 80 years.

Each number was called back up to 10 times before a number was recorded as being of ‘no contact’ and ‘unknown eligibility’.

Table 2.1 reports key figures for the seven sub-samples used in this report. The source for all of them is a national pool consisting of a large amount of telephone numbers. Respondents are drawn at random from this pool until the desired amount of interviews is completed. Using Hungary as an illustration, the Hungarian pool or base sample consists of 6730 telephone numbers, from which a gross sample of 3640 numbers was needed to complete the 1500 interviews. In Hungary, 41 per cent resulted in an interview. In total, for all countries, 17 per cent of the gross sample actually resulted in an interview, leaving

[3] This part is taken from TNS Social: Welfare Quality Survey: Methodology and Technical Report. December 2005. This TNS report is for internal use only.
[4] In Norway, households were selected proportional to household size.
[5] In some cases, the last birthday rule was applied – same principle.

TABLE 2.1 The national sub-samples.

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden	Total
Sample base[a]	6730	18875	12429	29986	20486	20987	5371	114864
Gross sample[b]	3640	7441	9143	8880	5248	17311	4616	61594
No of interviews[c]	1500	1501	1503	1475	1503	1500	1525	10507
Response rate %	41%	20%	16%	17%	29%	9%	33%	17%

Note: [a] Pool of telephone numbers from which the actual sample is drawn; [b] sample base minus non-used numbers (number unobtainable, fax/modem, business, out of scope (household aged below 18 or over 80); [c] the number of completed interviews divided by the gross sample size.

us with a response rate equal to .17 and a corresponding drop-out rate of .83. This is a normal response rate for this type of data collection (for example, see Poppe and Kjaernes, 2003).

The main interviews were conducted in the period of 12–27 September 2005. (Norway started on 14 September because of a Parliamentary election.) The short period of fieldwork was intentional to avoid the possibility of a welfare animal scandal that could influence the answers. The respective national partners were to monitor the public debate, particularly media coverage, during the period in question. To our knowledge, no such scandals were on the agenda immediately preceding or during this period. General issues in public discourse in the various countries related to animal welfare are discussed in Roex and Miele (2005).

Deciding the sample size, we do not pay attention to the number of citizens in each country. This is because there is almost no correlation between the population size (the universe) and the sample size. Each country is treated as a separate population and representativity is based on statistical considerations rather than population size. The decision of the smple size is based upon the confidence limits we want the estimates to operate within. With a sample of 1500, a confidence interval of 95 per cent probability, and a 50/50 distribution, ±2.55 percentage units is accepted. This means, in the interval between 47.45 and 52.55 per cent proportion, it is a 95 per cent probability of finding the true population parameter (the square root of (50*50/1500)*1.96 = 2.55). Inferential statistics are influenced by the sample size, and it is important to compare significance tests between the different countries. Comparisons of tests across countries are therefore difficult if we operate with different sample sizes. This is the main reason for having equal sample sizes across all countries.

2.3.2 Weighting Procedure

Although the sampling technique aimed to minimize sample error, weighting was necessary to correct for the probability of selection according to household size (otherwise those living in large households would be underrepresented) and non-response. In some countries, it is becoming harder to achieve interviews with certain groups, particularly younger males. Research fatigue is evident with many members of the public simply refusing to consider taking part in surveys.

TNS Social sourced all data for these weighting factors. This approach ensured uniformity of the method for collecting data (it was essential that national statistics were collected for the population aged 18–80 years only) and crucially it ensured uniformity in the method of calculating and applying the weights.

Age, gender, region and household data for the target population in each of the seven countries was sourced from official national data sources. The national data were then compared with the achieved sample to determine which corrective weights were necessary.

TNS Social in collaboration with TNS UK's statistical services specialists applied interlocking weights on the Weight 1 factor for all countries. A cell matrix was designed based on interlocking data with actual data compared with target data.

The second weight was problematic as household data could not be sourced to the level of detail necessary to meet sample criteria. In most countries, data exist for all persons in households or all adults in household, typically 16+ years-of-age. Data for each country could not be sourced for household members aged 18–80 years old. With this consideration, target data was calculated on the basis of known data.

The household factor was not necessary for all countries. In Norway, there was no need to adjust for a household factor as the Norwegian sampling process ensured that data were already representative of the number of persons in the household. In the analysis for France, Italy and the Netherlands, the household factor was deemed unnecessary because the interviews achieved broadly represented the actual household composition. In the UK, Hungary and Sweden, the household factor was applied, as in each case one-person households had been underrepresented.

Consequently, the samples were weighted by region, sex, age and household size in some of the countries. This weight is genuine for each country. That means we have seven different populations and seven different samples with equal sample size.

In most of the analyses in this project, results are compared between countries. If some of the analyses should be carried out for the seven countries treated as one population and one sample, the results will be corrected for the fact that differences population size could influence the outcome. Data from each country will be weighted in proportion to this country's share of the total population size in all countries. If this weighting is *not done* when treating the sample as one sample, each country will have equal influence on the average results (because sample sizes are equal). This is also a possible solution, but should be made explicit for every presentation of *total* distributions. In very few analyses, however, there is a need to look at the seven countries as one region. In these latter cases, we will weight the data by region, sex, age, household size and *population size in each country* (persons between 18 and 80 years). In this case we will consider all the seven countries as one population and our samples are merged into one sample.

TABLE 2.2 The seven countries as one population, the distribution of the population size (age 18–80).

	Frequency	%
Hungary	506	5
Italy	2927	28
France	2943	28
United Kingdom	2700	26
Netherlands	783	7
Norway	214	2
Sweden	427	4
Total	10500	100

2.3.3 REPRESENTATIVITY OF THE SAMPLES

In this part, we will show some of the distributions of the demographic variables. They are all weighted, and should give a picture of the official statistic in the various countries.

SIFO has checked the representativity of the sample by comparing the distribution of sex and age with official statistics in the different countries and the weighted results seem quite satisfactory.

2.4 VALIDITY

Validity is crucial when operationalizing research questions into precoded telephone questionnaire questions. Validity problems are particularly challenging since we are dealing with seven different national contexts with varying cultural characteristics, market structures, consumption habits, and public discourses. The questionnaire should in principle be exactly identical in all seven countries. However, we are fully aware of the fact that the questionnaire is presented to people with different cultural intent and institutional settings, and where the words, although carefully translated, may have diverse connotations. On the one hand, this is precisely the intent of this Welfare Quality study, and the questionnaire was carefully constructed to meet this challenge. On the other hand, we can of course not preclude the possibility that some questions are interpreted differently across national and cultural settings. We must also take into consideration when interpreting and analysing the results that animal welfare represents a ‘good cause’, which may push the respondents towards giving politically or ethically ‘correct’ answers rather than expressing personal doubts or ‘unacceptable’ habits.

In this chapter, we will evaluate some of the questions from the survey according to validity issues. Validity is a term to describe whether a measurement instrument or test measures what it is supposed to measure (Vogt, 1993). In other words, validity indicates

TABLE 2.3 Distribution of males and females (%).

	Hungary	Italy	France	United Kingdom	Netherlands	Norway	Sweden
Male	47	49	49	49	50	50	50
Female	53	51	51	51	50	50	50
	100	100	100	100	100	100	100
N	1500	1500	1500	1500	1500	1500	1500

TABLE 2 4: Distribution of age (%).

	Hungary	Italy	France	United Kingdom	Netherlands	Norway	Sweden
18–24	14	12	9	11	12	10	9
25–34	18	16	21	19	17	21	19
35–44	14	19	21	21	22	19	20
45–54	22	18	17	18	19	20	16
55–64	15	18	15	17	17	17	20
65–74	11	12	11	10	10	10	11
75–80	5	4	5	4	3	3	3
	100	100	100	100	100	100	100
N	1500	1500	1500	1500	1500	1500	1500

whether the operationalization of a question is in accordance with the theoretical construct it is supposed to measure.

2.4.1 Eating Practices in the Survey – Are the Results Plausible?

Eating practices are patterned very differently across countries. For the interpretation of the analyses, it is crucial that recorded variations in this survey are in accordance with other types of information on eating patterns. One set of questions in the survey is the frequency of eating various meat items. We have chosen to compare this with available statistics on gross production (whole carcasses), measured as kg per capita. This is an indicator at the level of primary production rather than consumption. However, the advantage of using these aggregate data is that they are comparable across countries, giving a rough picture of relative levels of consumption of various types of meats.

We have compared the distributions for our questions with official statistics for chicken, pork and beef. In the survey, we asked for the frequency of eating a number of meat items; chicken (q. 5.1), bacon and/or ham (q. 1.3), sausages (any kind) (q. 1.4), pork (q. 1.5), and beef (q. 1.6). Since bacon and ham are pork products, we combined this with the question on pork (chops, etc.) to form an index for comparison with gross data; the proportion of those who ate these products weekly or more often, either one of them or all. Sausages were not included, since they may contain several types of meats.

There are some variations across the countries; Hungarians, British and Dutch eat chicken fairly often (Figure 2.1). Compared to other types of meat, eating pork is more common in almost every country, except Norway. Eighty-six per cent of Italians eat pork on a weekly basis or more often, while this is 83 per cent in France, 78 per cent in the

Netherlands, 77 per cent in Hungary, 76 per cent in Sweden, 75 per cent in the UK, 'while only' 65 per cent in Norway. Beef is most frequently eaten in France, Italy and the Netherlands, to some extent in Sweden, the UK and Norway, and rarely in Hungary.

These figures about the frequency of eating meat are compared with the total production of these kinds of meat (Figure 2.2). Variations of the different measurements of consumption between countries are consistent to some extent. The average consumption of poultry per capita is higher in Hungary, the UK, France and the Netherlands than in the other three countries. This pattern is almost the same as for eating (Figure 2.1), except in the case of Italy, which has a higher proportion of eating chicken compared to France, but lower average poultry consumption compared to France. It is important, however, to be aware that poultry as measured in kg per capita has a wider definition than chicken. Pork consumption per capita is highest in the Netherlands, Italy, France and Sweden, and lowest in Norway. The same tendencies are reflected for eating. Beef and veal consumption per capita is highest in France, Sweden and Italy, low in Norway, and very low in Hungary. The high level of beef/veal consumption per capita in the Netherlands compared to the two other meat products, poultry and pork, is not reflected in the eating practice data. However, again, beef/veal is a wider category than the eating practice category, which was just beef.

In total, the overall shapes of the two charts reflect many of the same tendencies, even though the data are very different. Our conclusion is therefore that the quality and the validity of the eating practice data are acceptable, as they do not show any "odd" pattern compared to the aggregate level data.

2.4.2 The Filter for Vegetarianism Was Too Restrictive

In q. 2 we asked 'Do you consider yourself to be a vegan (that is, you do not eat eggs or dairy products or any foods of animal origin), total vegetarian (you eat dairy products but not fish or meat at all), partial vegetarian (you do not eat meat regularly but you can eat fish or you eat meat very occasionally)'. This question was filtered from q. 1: those who had answered 'less often' and 'never' in q. 1 to all meat options (chicken, bacon and/or ham, sausages, pork, beef) should answer q. 2 – the vegetarian question. However, this filter seemed to be too restrictive, as very few were included in the vegetarian category. For example, in the UK only 3 per cent claimed to be a vegan or a vegetarian, while other studies estimate 8 per cent (Kjærnes et al., 2005). All respondents should have been asked this question, because there are degrees and various forms of vegetarianism.

As an indicator of vegetarianism, understood as not eating meat, we therefore computed an index of the meat-eating question – q. 1 (Table 2.5). For each meat item, those who ate meat daily, several times a week, weekly, or monthly were given the value 0, while those who answered 'less often' or 'never' were given the value 1. These five variables were computed into an additive index. Scoring 5 on the index meant eating all five meat products less than monthly or never, scoring 4 meant eating four of the five meat products

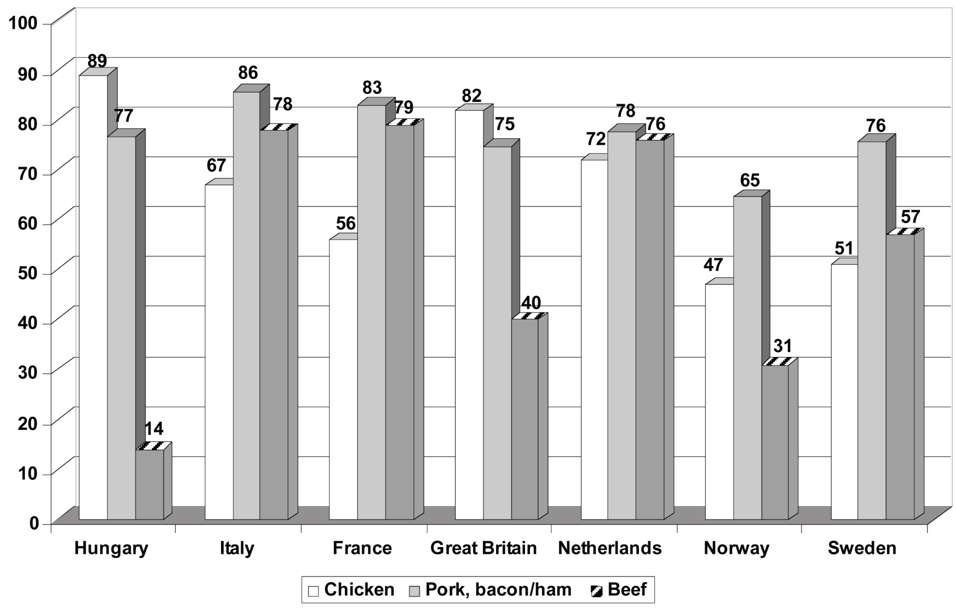

FIGURE 2.1 Eating practice: proportion eating chicken, pork and/or bacon and/or ham and beef, weekly or more often.

Note: Pork, bacon and/or ham is an index of two question – q. 1.5 and q. 1.3, where the proportion show if the respondents eat pork and/or bacon and/or ham weekly or more often. The remaining group summarized up to 100, shows those who eat all these products less than weekly.

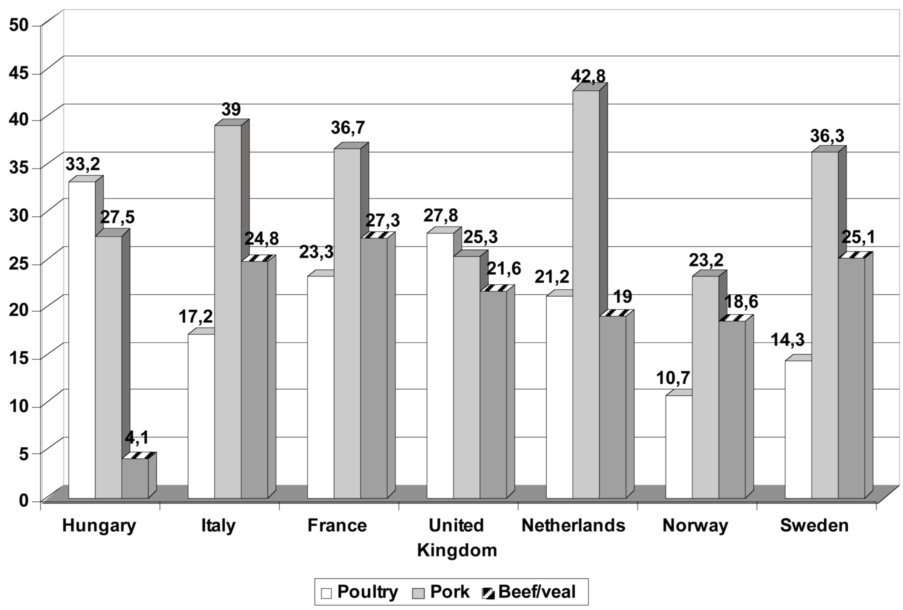

FIGURE 2 2: Meat consumption, kg per capita (domestic) (2003).

Sources: The national statistical bureaus. Food balance sheets. Pork consumption in Hungary is not comparable with the other countries, because pork do not include lard.

less than monthly. We took these two scores as indicators of full or partial vegetarianism. Based on this calculation, 8 per cent of British are vegans or vegetarians, which corresponds reasonably well with findings in other studies (Kjærnes et al. 2005).

TABLE 2.5 Index of frequencies of *not* eating various meat items (chicken, bacon and/or ham, sausages, pork, beef).

Index	Hungary	Italy	France	UK	Netherlands	Norway	Sweden
0	30	51	61	41	51	52	63
1	34	25	23	24	26	26	21
2	19	14	11	17	11	13	8
3	12	6	4	9	7	6	3
4	4	3	1	5	2	3	2
5	1	1	1	3	3	1	3
	100	100	100	100	100	100	100
N	1498	1497	1498	1499	1494	1494	1501

Notes: The higher the score on the index, the higher the probability of being a vegetarian; don't know excluded.

2.4.3 Edibility – The Country Context Has to Be Taken into Consideration

We asked if some animals were found appealing or unappealing to eat, thus trying to grasp some cultural differences in edibility (q. 3). The animals in question were venison, veal, horse, ostrich and rabbit. Four of the five animals were the same in all 7 countries, apart from the first one, venison. This category indicated a large wild animal and was by the interviewers concretized as the kind of animal commonly hunted in the respective countries:

Hungary:	'Vadhús' (wild game meat);
Italy:	'Cervo, cinghiale' (fallow deer, boar);
France:	'Gibier' (game);
United Kingdom	'Venison' (wild game meat, especial red deer);
Netherlands:	'Hertenvlees' (venison);
Norway:	'Hjort og elg' (red deer and moose);
Sweden:	'Vilt (älgkjött, rådjurskjött, etc.) (moose, roe deer).

Table 2.6 presents the answers regarding how appealing the respondents see venison. It is possible that different examples of game animals may influence the answers. However, such differences can hardly explain the large variations across the countries, which must refer to differences in culinary cultures, hunting traditions, etc. While a majority in Scandinavia see venison as very appealing, the opposite is the case in countries like the Netherlands, Britain and Italy.

2.4.4 Loaded Connotations?

Sometimes connotations are loaded, either in a negative or a positive way. The negatively loaded alternatives will be systematically underreported, while the positive ones will be overreported. This kind of systematic measurement error is related to construct validity

Fallow deer (Italy)

Roe deer (Sweden)

Moose (Norway, Sweden)

Wild boar (Italy)

FIGURE 2.3 Examples of animals considered to be game.

TABLE 2.6 Q. 3.1 'How appealing is venison? (If eat meat)' (%).

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden
Not at all appealing	29	46	40	48	56	6	9
2	10	13	22	13	12	5	8
3	16	15	18	16	13	12	20
4	17	12	9	10	12	26	22
Very appealing	28	14	10	13	8	52	40
Total	100	100	100	100	100	100	100
N (Don't know excluded)	1464	1205	1490	1385	1386	1475	1468
Don't know/Refused	1.7	19.3	0.3	6.0	6.2	1.3	0.9
N (total, if eat meat)	1490	1493	1494	1473	1478	1496	1481

Note: Q. 3: How appealing are each of the following meats on a scale of 1–5, where 1 is not at all appealing and 5 is very appealing? (If eat meat).

(Judd and Kenny, 1981). We will here bring up some issues that we encountered in the formulation of the questions and reviewing the distribution of answers.

Eggs – Organic, Free Range, Hens in Cages

The supply of eggs is often differentiated into categories that have some reference to animal welfare. The categories themselves may, therefore, have loaded connotations, like eggs from free-range hens and eggs from hens kept in cages (battery, factory). Table 2.7 presents the distribution of answers, as well as the percentages of who did not know or refused to answer.

The proportions of respondents who buy organic and free range are, according to our results, high. For some of the countries, this does not correspond to the market shares of organic and free-range eggs. In Norway, for example, the market share for eggs from free-range hens is only 5 per cent (source: the main egg supplier Prior). The market share of organic eggs from grocery stores in Norway is 2.3 per cent (Statens landbruksforvaltning, 2005). It looks as if the Norwegian answers are systematically overreported towards the free-range options (organic plus free-range – 50 per cent). In Hungary, survey results also show that eggs are purchased from sources other than the main shops. It is not unreasonable to assume that eggs are also purchased from the same outlets where chicken is purchased, e.g. markets and 'private vendors. Focus-group participants considered produce purchased from markets and sources in the country to be raised in a free-range environment, and some even went as far as to think that these products could be considered organic. It is therefore not surprising that two out of three respondents, when surveyed, stated that they purchased free-range eggs, and a further 8 per cent bought organic eggs, despite the fact that participants in the focus groups stated that they had difficulty purchasing welfare-friendly labelled products. It is also worth noting that focus-group participants were confused in their understanding of the organic certification process, and there was a general belief that organic production meant that animals did not receive any medication such as antibiotics. By this deduction, some participants, who bought from a market vendor or a source in the country, assumed they were either buying organic or free-range products. Although these products were not labelled as such, this belief may be well founded.

There are no figures for the Italian market share of free-range eggs and organic eggs. The survey showed that 14 per cent bought organic eggs, while 47 per cent bought free-range eggs. They just mention that these data are consistent with the Italian focus-group findings. The country report from France tells the same story: The eggs from free-range farms come first of the types of eggs purchased, with 6 per cent of the answers (overrepresentation of the oldest slices of age), before the 'organic' eggs (14 per cent). These data coincide with the speeches collected during the focus-group meetings: free-range products are more implicitly considered as animal welfare-friendly products than are organics. In the Netherlands, the survey showed that 82 per cent of the Dutch respondents say that they normally buy free-range eggs. Only 3 per cent of the Dutch respondents claim that they buy battery cage eggs on a regular basis. However, the fact is that 16 per cent of the eggs sold on the consumer market are battery cage eggs. From 2004 onwards, it is no longer possible to buy battery cage eggs in Dutch supermarkets. Only in small stores, from butchers and at markets, it is possible to buy battery cage eggs. At these places, it is often not that clearly communicated whether the eggs are free range or not, and sometimes it is even wrongfully suggested that the eggs are free range. Another explanation is that people may not like to think of themselves as buying battery cage eggs.

In the United Kingdom, 15 per cent said in the survey that they bought 'organic' eggs and 71 per cent bought free-range eggs. This does not at all correspond with the statistics of egg production, as 66 per cent of egg production in 2004 came from farms using a 'laying cage system', a type of system that equates to 'battery' egg production. Twenty-seven per cent of eggs had been produced in 2004 by farmers using a 'free-range system', which

TABLE 2.7 Q. 8 'Which eggs do you normally buy? (If buy eggs)' (%).

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden
Organic	8	23	14	15	12	9	16
Free-range	65	47	60	71	82	41	65
Subtotal free range	73	70	74	86	94	50	81
Battery (factory)	9	5	5	4	3	8	2
Any/no preference	17	25	21	10	3	42	17
Total	100	100	100	100	100	100	100
N (don't know excluded)	1119	1026	1248	1312	1221	1335	1328
Don't know/refused	6.1	5.5	0.8	1.5	1.2	2.3	1.5
N (total, if buy eggs)	1196	1086	1258	1332	1236	1366	1348

Note: Filtered, if buy eggs: Q. 8 When you buy eggs, which of these do you normally buy?

includes eggs produced organically. This disparity between the survey data and other sources is the same tendency as in Norway. The country report from Sweden did not comment very much on this question; the information they give about their egg consumption seems to be reliable, when compared to sales figures.

A pan-European survey of attitudes towards the welfare and protection of farmed animals, as part of the Eurobarometer (European Commission, 2005), can help us to check the consistency of some of the questions in our questionnaire.[6] The results are presented in Table 2.8. The interviews were conducted by face to face interviews. One of the questions was similar to our question about eggs. Two of the options were buying eggs from hens in free-range systems both indoors and outdoors. We had the options of organic and free range. Eurobarometer rotated their options; we did not, because organic had to be presented for the respondent before free range. Organic eggs are produced in free-range systems, but the opposite is not the case: free-range hens do not necessarily produce organic eggs. The sum of organic and free range is free range. Comparing the rows in Tables 2.7 and 2.8 highlighted by italics, we see large differences between some of the countries, such as Italy and France, where the results from our telephone survey are much higher. The proportion of free range is higher for all countries in the Welfare Quality survey (telephone interviews) compared to the Eurobarometer (face-to-face interviews). There may be several reasons why these results do not seem to correspond. As indicated by data on market shares, none of these seem to be quite in accordance with shopping practices and availability.

This lack of accordance may be explained by the understanding of the categories as well as the connotations to the labels used to name the alternative categories. Some words may have a negative connotation while others have a positive one. In this particular question, most people have positive connotations to organic and free-range production, but have negative connotations to battery systems and cage systems. In all the translated questionnaires, the terms 'cage', 'battery' or 'factory' were used, which give associations to bad treatment of the laying hens. Organic and free-range hens are probably believed to have a more happy life. The respondents want to do the right thing for a good cause, telling about their good intentions instead of what they actually do.

[6] As a non-member, Norway is not included in the Eurobarometer.

TABLE 2.8 Percent proportion buying eggs in non-caged systems indoors systems, free-range systems or outside

	Hungary	Italy	France	UK	Netherlands	Sweden
In non-caged systems indoors	7	12	5	5	33	8
In free-range systems or outside	53	28	44	69	45	71
Subtotal free-range	60	40	49	74	78	79
In battery cage production systems	4	14	32	8	6	8
In other caged production systems	2	16	7	3	6	4
Subtotal cage	6	30	39	11	12	12
I do not pay attention	34	30	12	15	10	9
	100	100	100	100	100	100
N	606	803	913	1168	916	926

Source: European Commission (2005).

Notes: When you buy eggs do they mostly come from hens kept? a. in battery cage production systems, b. in other caged production systems (cages with a perch, dust-bath and nest etc), c. in non-caged indoor systems (barns, etc), d. in free-range systems or outside, e. I don't buy hens' eggs, f. I do not pay attention to the type of system, g. don't know; don't buy eggs and don't know excluded.

Hungary: 'Ketreces/belterkes tartásból scármazó (gyári) tojást, vagry';
Italy: 'Uova da lalline allevate in batteria';
France: 'Œufs pondus par des animaux élevés en batterie (usine)';
United Kingdom: 'Battery (factory)';
Netherlands: 'Legbatterij eieren';
Norway: 'Egg fra høner I bur';
Sweden: 'Ägg fån fabric'.

This may also be a question of knowledge, or lack of knowledge. The consumers may not be aware of which kinds of eggs they are buying and the labelling may not give sufficient information. Moreover, broader characteristics may also be involved. Perhaps many Norwegians think that all eggs of domestic origin are welfare friendly and Italians may believe that eggs from their particular region or supplier are produced organically or in free-range systems, without any particular qualification of such beliefs.

If this variable is used in further analyses, one should be very careful, and results should be discussed in view of information about market shares for different types of eggs in the various countries.

Organic Meat – Also a Good Cause?

There is also a possibility that consumption of organic meat is overreported, as indicated by the figures presented in Table 2.9. In Norway, only 1.32 per cent of total meat production is organic, based on slaughtering weights (Statens landbruksforvaltning, 2005). However, the correspondence is not as bad as for eggs. The response categories 'sometimes' and 'rarely' are not very precise terms of frequencies, and hence may express subjective guesses. In Hungary, when asked if they buy organic meat, 81 per cent of respondents rarely if ever buy organic meat. While the focus-group findings indicate that the consumption of labelled welfare-friendly products is low, the high level of consumption of welfare products reported in the survey may be a better indicator of the true consumption levels of welfare-friendly products. In Italy, 40 per cent of the sample affirms to buy organic meat (17 per cent 'always' and 23 per cent 'sometimes'. These data are consistent with the Italian focus-groups findings. At this stage of the research, among the characteristics that participants state they look for during their shopping there are also some *references to the animal welfare content*. In the same way buy organic products has a similar implication: for most people organic is synonymous of good life for farmed animals. In Sweden it seems that the respondents overestimate their actual consumption be-haviour, in favour of a behaviour which is more animal welfare friendly. If we compare with sell figures for instance, the results in Q10 should be used careful. Available data on actual consumption of organic meat points at a very low share of total meet consumption (definitely below 10 percent). The answers in Q10, on the other hand, indicate a share around 40 per-cent. Consumers may, however, have a somewhat unclear understanding of what is meant with "organic" meat – the knowledge about what organic labelled meat stands for is for in-stance low among Swedes (LR, FGR) – making an interpretation of the results more open.

2.4.5 When the Respondents Don't Know What to Answer

The option 'don't know' was included in most of the questions in the questionnaire, but the interviewers were instructed not to read them out. When, in spite of this, some informants ended up in the 'don't know' category, we have in fact two questions (variables) in one, one where the answer is missing and one where the respondents explicitly said that they do not know or are uncertain about the answer to the question posed.

When the respondents actually do not know what to answer in a survey, this category can be treated in four ways. One way, the most common, is to exclude the respondents answering 'don't know' from the analyses, analysing only those who have an opinion on the subject we have asked for. The second way is to include 'don't know' as an extra value. This is not a very good idea, since the question then should be treated as two variables, as the size of this value will influence the distribution of the other values. This is particularly problematic if the proportions of 'don't know' vary between the categories compared. A third way is to recode the 'don't know' category into a mid-category on a scale with uneven numbers – for example, a five point scale, were the mid-category is 'both/and' or 'neither/nor'. All these are reflecting uncertainty. This is relevant for multivariate analyses,

Table 2.9: Q. 10 'How often do you buy organic meat? (If buy meat)' (%).

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden
Always	8	17	9	11	9	2	6
Sometimes	11	23	36	28	36	19	39
Rarely	17	20	25	22	24	38	28
Never	64	40	31	39	31	40	27
Total	100	100	100	100	100	100	100
N (don't know excluded)	1150	1115	1307	1303	1226	1309	1285
Don't know/Refused	9.6	6.7	2.7	3.3	2.1	4.6	5.0
N (total, if buy meat)	1276	1195	1343	1350	1252	1375	1353

Note: Question 10 When you buy meat, how often, in general, do you buy organic? (If buy meat) thus avoiding losing too many respondents. It is only recommended if the mid-category on the scale and the 'don't know' category do not vary systematically according to some key variables, such as gender, age, education, etc.

A fourth way is to analyse the question as two variables, one with the genuine options, and the other analysing the 'don't know' as an extra variable. This may be useful if the 'don't know' value is sizable. In some cases, a high proportion of 'don't know' maybe case for substantial interpretation. In our survey, this is particularly relevant for some of the questions about assessments of farm animal welfare, for which we cannot expect all respondents to have sufficient knowledge to make their own judgements (this is discussed in more detail in Chapter 3). The same may be the case for sensitive questions such as income. In question 3 – a set of questions on how appealing various kinds of meat are[7] – there were high proportions of 'don't know' in some countries. In Hungary, 20 per cent answered 'don't know' to ostrich, in Italy 19 per cent answered 'don't know' to whether venison was appealing, 14 per cent to horse, and 49 percent to ostrich. In Norway, 11 per cent answered 'don't know' for ostrich. We think that one plausible interpretation of these high figures might be that the respondents are not familiar with the type of meat.

When there are high proportions of 'don't know', this has to be taken into account in the analyses. This could be an answer of substance, and hence would be interpretable. When the proportion 'don't know' is low, it is better to recode them as missing and leave them out of the analyses. This must be evaluated on a case-by-case basis.

[7] How appealing are each of the following meats on a scale of 1–5, where 1 is not appealing 5 is very appealing? (If eat meat). How appealing is venison, veal, horse, ostrich, rabbit?

3

ANIMAL WELFARE AND FOOD CONSUMPTION: AN OVERVIEW OF OPINIONS

3.1 INTRODUCTION

This chapter presents an overview of variations in animal welfare concerns. The chapter focuses on three major themes. First, we assess the extent of social engagement in farm animal welfare issues, in general and in relation to specific species and issues. We also present data that give some indication on whether this interest also means that people are worried about the conditions for farm animals on the farm, during transport and slaughtering. Second, we discuss how this engagement is reflected in everyday consumption practices across Europe, in terms of buying special welfare-friendly products or through other strategies. Fourth, we focus on some conditions for market involvement. We present data on whether the respondents see limitations in terms of availability and price. We also describe to which degree people trust various actors involved in animal welfare issues.

In this chapter, we will present a rather straightforward description of the national response patterns for the relevant questions, based mainly on frequency distributions. We will find some common patterns across the seven countries as well as distinct national and regional features. In Chapter 4, we will make further use of some of these data in a more theoretically founded analysis of how people across Europe relate to farm animal welfare in their role or capacity as buyers and eaters of food.

3.2 PEOPLE ARE INTERESTED, BUT NOT NECESSARILY WORRIED

Earlier studies have indicated that animal welfare is often met with interest and concern. In this section, we will explore first to what degree this is the case in our seven study countries. Then we ask whether interest also reflects worries about specific aspects in their own countries. The assumption is that recognizing problems will form an important point of departure for people's involvement as citizens and consumers. This set of questions will also give information about which conditions cause most concern. As a different approach to the level of concern, we asked whether the respondents think that welfare conditions in their own country have improved or deteriorated. This is a question that may be linked not only to whether people see a need for action, but also to trust in actors involved in meat production in the monitoring and control of these processes.

Figure 3.1 illustrates the various dimensions that we have included in order to map general opinions about farm animal welfare. It is intended to indicate that these dimensions may be correlated, though not necessarily overlap completely. We should also be careful to infer that this is always a step-wise process where, for example, general interest opens up for more recognition of problems regarding specific conditions and more concern for ongoing changes (perhaps because of clearer or higher expectations). It could also be that emerging recognition of problems leads to higher general interest. In general, it may be that such associations are found at a societal level, rather than being a matter of causal factors at the individual level. Later analyses will explore to what degree we find such processes, and whether even other types of associations and explanations are involved. In this paper we will concentrate on comparing patterns in public opinion at national levels.

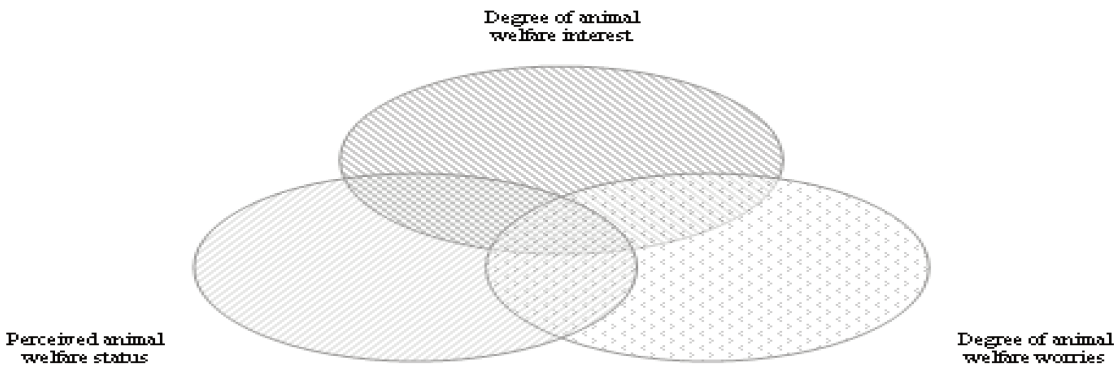

FIGURE 3.1 Illustration of different dimensions of public opinion about farm animal welfare.

When asked how important animal welfare issues in general are to them,[8] the respondents to claim a large degree that this issue *is* important (Figure 3.2). Very few say that farm animal welfare is of little or no importance. Proportions answering 'very important' range from 35 to 77 per cent, placing the Netherlands at the bottom and Italy at the top. Few state that animal welfare issues are of little or no importance. When merging the two most positive response categories (4 and 5), the ranking of all study countries is; France (65 per cent), the Netherlands (69 per cent), the UK (73 per cent), Hungary and Sweden (83 per cent), Norway (84 per cent) and Italy (87 per cent).

[8] Thinking of animal welfare in general, how important is this issue for you on a scale of 1–5, where1 is not at all important and 5 is very important?

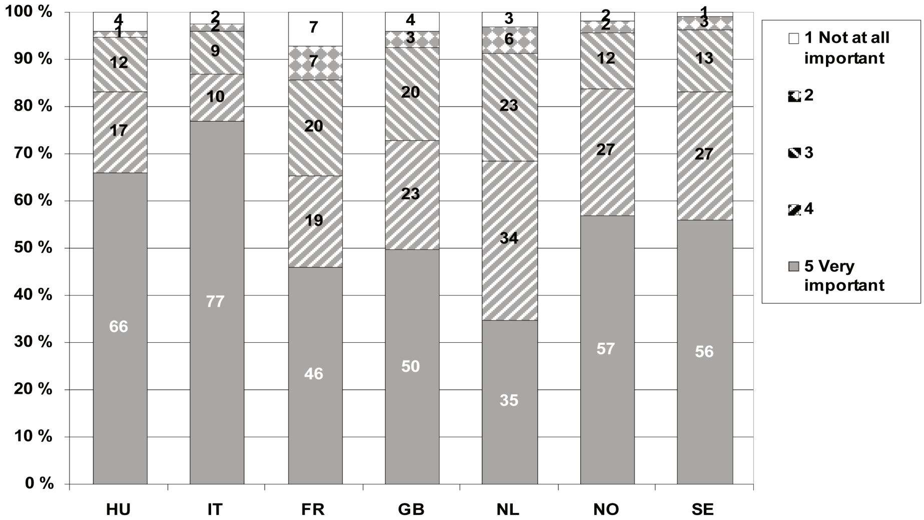

FIGURE 3.2 Thinking of farm animal welfare in general, how important is this issue for you on a scale of 1–5, were 1 is not at all important and 5 is very important?
Note: Weighted; don't know excluded; N = HU: 1462, IT: 1478, FR: 1497, GB: 1490, NL: 1489, NO: 1493, SE: 1496.

Placing importance on an issue does not necessarily mean that people are concerned and worried. We think that concerns will be influenced by how they consider the actual welfare conditions. In order to grasp consumer worries related to specific species, the respondents were asked to evaluate the living conditions of pigs, chickens and dairy cows in their own country.[9] Overall, rearing conditions for chicken are met with most worry (Table 3.1). With the exception of Hungary, 40–57 per cent of the respondents see conditions in chicken production as poor or very poor. Regarding pigs, few respondents in Norway and Sweden assess the situation as poor or very poor, while more than 40 per cent say the same in France and the Netherlands. Few utter worries about dairy cows.

TABLE 3.1 Worry about welfare for pigs, chickens, dairy cows, transport, slaughtering (% of answers 1+2, where 1=very poor).

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden
Pigs	22	32	42	21	44	12	14
Chicken	29	50	57	56	49	46	40
Dairy Cows	15	15	15	12	10	3	5
Transport	60	65	52	48	56	34	34
Slaughtering	58	56	44	42	47	25	23

Notes: Questions: 'How well do you think the welfare conditions are for the following farm animals in your country, on a scale of 1–5, where 1 is very poor and 5 is very good? (pigs/chickens/dairy cows)'; 'What about the methods used to transport animals in your country, using the same 1–5 scale, where 1 is very poor and 5 is very good?'; 'How well do you think the animals are treated at the slaughters in your country on a scale of 1–5, where 1 is very poor and 5 is very well?' (for all three questions: weighted, N=1500 in each country, don't know excluded).

[9] How well do you think the welfare conditions are for the following farm animals in your country, on a scale of 1–5, where 1 is very poor and 5 is very good? (pigs/chickens/dairy cows)

Considering all three species together, we see that Norway, Sweden and Hungary cluster at the bottom regarding worries about the treatment of farm animals. In Norway and Sweden, very few worry about pig and dairy productions, while even there chicken rearing causes considerable concern. More widespread worries about the rearing of farm animals are found in the UK and Italy. The highest levels are found in France and the Netherlands, the most distinguishing factor being that they are considerably more worried about pig production than in the other countries.

Turning to methods of transportation[10] and slaughtering,[11] we see that a majority in most countries is worried about welfare conditions in these situations (Table 3.1). When merging the proportions of the two most critical categories (1 and 2), we find that more than 40 per cent are worried about both issues in all countries. The exceptions are Norway and Sweden, were the ratings are much lower. In all countries, the conditions for transportation cause more worry than the methods used at the abattoirs. Respondents in Italy and Hungary have the most negative evaluations of welfare conditions in transportation and slaughtering.

Overall, Italians appear to be most worried, particularly with regard to transportation and slaughtering. Worries are widespread even among French and Dutch respondents, but they are, compared to the Italians, more concerned with rearing conditions. Hungarian concerns concentrate on transportation and slaughtering, while considerably fewer say that rearing conditions are unacceptable from an animal welfare point of view. Norwegian and Swedish respondents are systematically less worried about all these aspects of farm animal welfare. Apart from the rearing of chickens, few think that welfare conditions are poor.

If we consider the general importance put on animal welfare in relation to these expressions of worry, we find that while the French and the Dutch consider farm animal welfare in general to be of least importance to them personally, compared to respondents in the other countries, they appear at the same time to be the most worried about the well-being of farm animals in their own countries. The opposite effect occurs when Norwegians, Swedes and Hungarians claim animal welfare in general to be an issue of great personal importance; at the same time, they seem to be the least worried about conditions for farm animals in their countries. There is more agreement between the importance put on farm animal welfare in general and worry about farm animals' living conditions among the British and the Italian respondents.

As another approach to the question of whether people worry, we asked for evaluations of change regarding farm animal welfare in their own country over the last 10 years, whether conditions have improved, remained more or less the same, or have become worse.[12] Overall, most respondents believe that farm animal welfare has improved over the last 10 years in their own country (Figure 3.3). The proportions saying that conditions have

[10] What about the methods used to transport animals in your country, using the same one-to-five scale, where 1 is very poor and 5 is very good?

[11] In your opinion, how well do you think the animals are treated at the slaughterers in your country on a scale of 1-5, where 1 is very poor and 5 is very well?

[12] In general, over the past 10 years, do you think that farm animal welfare in your country has improved, is about the same or has got worse?

'improved' range from 55 per cent to 69 per cent, the only exception being Hungary. More Hungarians say that conditions have remained the same or have deteriorated. In the other countries, about one third to one fourth say that there have not been major changes, with the highest proportions (after Hungary) in France and the UK. This mid-category is not necessarily a neutral position. No change may also indicate that conditions are believed to be as bad – or as good – as before.

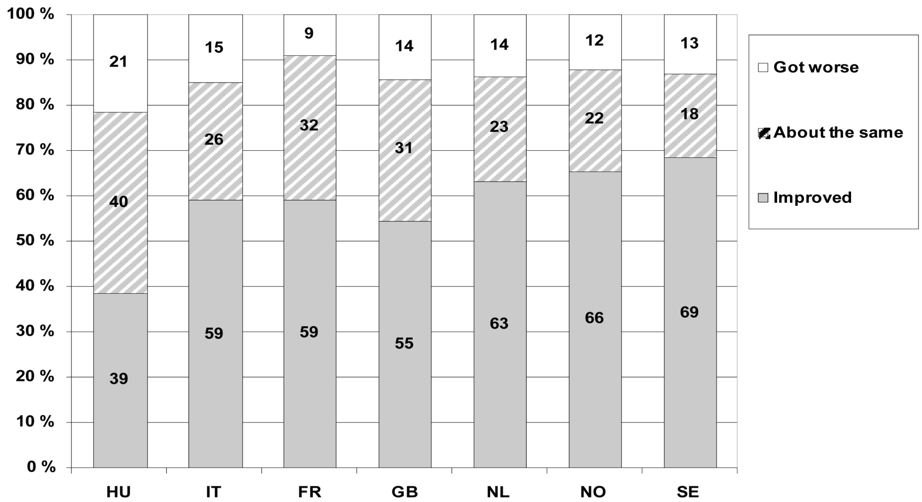

FIGURE 3.3 In general, over the past 10 years, do you think that farm animal welfare in your country has improved, is about the same or has got worse?
Note: Weighted, don't know excluded (N = HU: 1310, IT: 1365, FR: 1483, GB: 1384, NL: 1434, NO: 1463, SE: 1393).

The number of respondents answering 'don't know' is fairly high regarding all the specific questions about living conditions for farm animals (Table 3.2). In particular, Hungarians and Italians are not only sceptical about farm animal welfare, there are also very high proportions who 'don't know'. In the case of slaughtering, for example, 28 per cent of the Hungarians and 26 per cent of the Italians do not have any opinion about the standard in their own country. Hungary and Italy display the highest rates of 'don't know' throughout. Sweden and the UK form a middle group, while the Netherlands, Norway and France consistently have the lowest rates of 'don't know'. These high levels of 'don't know' indicate that people have considerable difficulties in assessing the welfare status of farm animals. This may be an indication of the status of knowledge about these issues. We can, of course, not assume that those being able to answer are well informed. But for those saying they don't know, the lack of knowledge (and perhaps motivation) has prevented them from answering.

Taken together, we find high general interest in farm animal welfare across the seven countries. One might say that farm animal welfare is 'a good cause', something that is difficult to disagree with. Yet, there are considerable differences between the countries, with Italians most strongly emphasizing animal welfare in general, and the Dutch the least. Country

TABLE 3.2 Proportions saying they don't know whether farm animal welfare conditions are good or bad (%).

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden
Pigs	12	20	2	12	3	3	9
Chicken	10	16	1	7	1	2	6
Dairy cows	15	16	1	7	2	1	4
Transport	8	16	1	8	2	7	10
Slaughtering	28	26	3	18	10	6	19
AW improved or become worse	13	9	1	8	4	2	7

differences are even more pronounced when we look at how this interest is reflected in worries about current welfare conditions. Most worries are expressed about chicken rearing, in some countries even about rearing conditions for pigs, while few people across Europe worry about the welfare of dairy cows. Transportation is also met with widespread worry, somewhat less for slaughtering. This 'ranking' of worries is similar in all countries. There are no clear patterns with regard to general interest and the degrees of worry. In particular, while the French and the Dutch present the most relaxed attitudes towards farm animal welfare issues in general, there are significant proportions in these countries who are worried. The Scandinavians, on the other hand, are very interested, but few worry. People are generally quite optimistic regarding the changes in welfare conditions for farm animals. Relatively few think that conditions have become worse. The same tendency is found in all countries, but the extent varies a bit, Hungarians being most worried.

3.3 COUNTRY VARIATIONS IN CONSIDERATIONS OF ANIMAL FRIENDLINESS WHEN PURCHASING FOOD

People's engagement in animal welfare issues may appear in many different forms and arenas. Buying welfare-friendly products is one way of taking action. We asked several questions about the links between animal welfare concerns and their own shopping practices. We will first present a general question about meat purchases. We then turn to eggs, where the general availability of animal friendly varieties is best. This is followed by questions about beef, which is a type of meat that is included in the diet in all countries (even though to a somewhat varying extent).

When asked if animal welfare is considered when buying meat,[13] more than half of the Italians and the Swedes use the two most positive values of a five-point scale (4 and 5) (Figure 3.4). The proportions among the Dutch and the Norwegian respondents are lowest. When comparing these results to a general emphasis on farm animal welfare,[14] we see that

[13] When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come, on a scale of 1–5 where 1 is never and 5 is always?

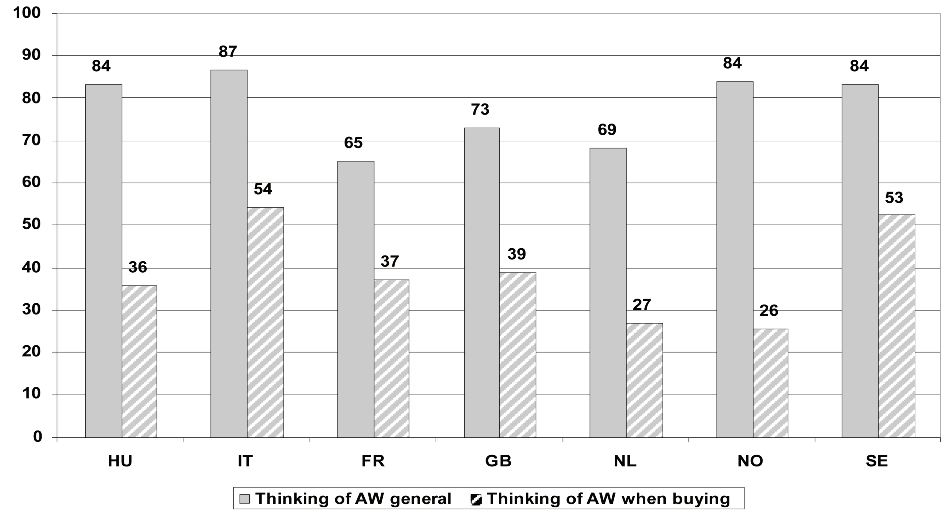

FIGURE 3.4 Thinking of animal welfare in general (among all), and thinking of animal welfare when buying (among those who have bought meat) (% answers 4+5).
Notes: 'Thinking of farm animal welfare in general, how important is this issue for you on a scale of 1–5, where 1 is not at all important and 5 is very important?' (Weighted, don't know excluded, N = HU: 1462, IT: 1478, FR: 1497, GB: 1490, NL: 1489, NO: 1493, SE: 1496); 'When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come, on a scale of 1–5, where 1 is never and 5 is always? (Among those who have bought meat) (Weighted, don't know excluded, N = HU: 1249, IT: 1173, FR: 1337, GB: 1330, NL: 1248, NO: 1364, SE: 1334).

general interest is not necessarily reflected in concerns when shopping. This is most evident among Norwegians, where 84 per cent see animal welfare as generally important, while only 26 per cent think of animal welfare when buying meat. The difference is also high among Hungarian and Dutch respondents. In France, Sweden, Italy and the UK, the difference between general interest and concerns when buying ranges from 28 per cent to 34 per cent. These results indicate that the relevance of farm animal welfare when buying food is not a self-evident consequence of a more general concern for farm animal welfare.

Still, farm animal welfare appears to be quite important even within the context of shopping. There is even higher engagement when asking about eggs[15] and beef[16] specifically. The proportion answering 'very important' ranges from approximately 60 per cent to 80 per cent in the various countries (Table 3.3). In general, the treatment of animals is considered to be slightly more important when buying beef than when buying eggs. The exceptions to this are France, where it is the other way around, and Norway, with fairly low proportions of 'very important' regarding both products.

[14] Thinking of animal welfare in general, how important is this issue for you on a scale of 1–5, where1 is not at all important and 5 is very important?
[15] Continuing with eggs, are the following factors very important, fairly important or not important to you? Freshness/Low price/Organic/Treatment of the hens/Hens are not treated with antibiotics or hormones.
[16] Now thinking specifically about beef, are the following factors very important, fairly important or not important to you? Treatment of the animal/Slaughtering methods/Low price/Raised outdoors for parts of the year/Animal is not treated with antibiotics or hormones?

TABLE 3.3 Are the following factors very important? (% 'very important' of egg and beef buyers).

		HU	IT	FR	GB	NL	NO	SE
Price	Eggs: Price	31	26	33	20	22	13	10
	Beef: Price	38	17	24	19	23	17	13
Eggs:	Eggs: Organic	39	45	40	23	35	12	25
Animal welfare of hens	Eggs: Treatment of the hens	58	77	73	64	62	41	59
Beef: Animal welfare	Beef: Treatment of the animal	61	79	64	69	67	48	71
	Beef: Slaughtering methods	47	62	52	59	52	39	51
	Beef: Raised outdoors for part of the year	59	78	65	57	66	48	47

Note: Continuing with eggs, are the following factors very important, fairly important or not important at all? A. Low price. B. Organic. C. Treatment of the hens. And, Now thinking especially of beef, are the following factors very important, fairly important or not important to you? A. Low price. B. Treatment of the animal. C. Slaughtering methods. D. Raised outdoors for part of the year. (Weighted, N=1500 in each country, don't know excluded).

To many people, higher standards of animal friendliness will be seen as one aspect of organic production. Importance placed on organic production of eggs varies from 12 per cent of 'very important' answers in Norway to 45 per cent in Italy. Italy, France, Hungary, and the Netherlands cluster as most interested in the eggs being organic, while respondents in Sweden and the UK form a middle group.

Large proportions say that when buying beef, they give emphasis to animal welfare factors such as treatment of the animal, slaughtering methods and outdoor access. The treatment of the animal is generally considered the most important factor, with the average proportion being 66 per cent. The animal being raised outdoor parts of the year has an average of 60 per cent, while an average of 52 per cent emphasize slaughtering methods in the seven countries. When adding all 'very important' answers for the three factors per country, Italy clearly has the highest score, while the UK, the Netherlands, France, Sweden and Hungary cluster in the middle group, and Norway once again stands out at the bottom of the scale.

The generally very high scores that we find for these questions indicate that people do link farm animal welfare conditions to their role as food consumers. However, considering the low market shares of animal-friendly and organic products, the responses cannot be interpreted as practices of choosing particularly labelled products. People may of course be overly optimistic in terms of their own actions. But focus-group interviews also indicate that people's references may be much wider than these labels, such as products coming from local or regional farmers (or from their own country) or fresh rather than pre-packed products. Further analyses of the focus-group interviews will help us understanding what people mean by emphasizing animal welfare when purchasing food.

3.4 AVAILABILITY A BIGGER PROBLEM THAN PRICE?

Purchasing routines will be influenced by practical considerations and the possibilities that are offered where people normally shop for food. In this survey, we concentrate on availability, as we already know that there are limitations in several of the countries, and on price, a basic aspect in all market exchange.

We first turn to opinions about the availability of animal-friendly products. The respondents were asked whether they agreed or disagreed that shopping for welfare-friendly products is too time consuming and whether such alternatives are hard to find.[17] Quite similar patterns are revealed for both statements, indicating that availability is a limiting factor for considerable proportions of the respondents in all seven countries (Table 3.4).

Hungarians score highest on both indicators, strongly agreeing that it is too time consuming (53 per cent) and that welfare friendly products are hard to find (61 per cent). At the other end of the scale, the Dutch are much less inclined to worry about availability (35 and 23 per cent, respectively). All other countries hold proportions between 40 and 50 per cent. For the most part, the respondents tend to agree more strongly with the statement about purchasing animal welfare-friendly products being too time consuming than that the products are hard to find. In Norway, the Netherlands, Italy, and Sweden, the difference is 10–15 per cent points. In Hungary, this is the other way around, with the argument of availability ranking 8 per cent points above that of time. We might interpret this as an expression of large problems of availability, however interested and committed the Hungarian consumers are.

TABLE 3.4 It is too time consuming to look for welfare-friendly products; I cannot find welfare-friendly products when shopping (% answers 4+5).

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden
Too time consuming	53	51	41	36	35	48	44
Cannot find animal welfare products	61	42	38	36	23	32	35

Note: To what extent do you agree or disagree with the following statements on a scale of 1-5, where 1 is strongly disagree and 5 is strongly agree? A I care about animal welfare, but it's too time consuming to look for welfare friendly products; B I care about animal welfare but cannot find welfare friendly products where I shop for food. Weighted. 1500 in each country. Don't know excluded

[17] To what extent do you agree or disagree with the following statements on a scale of 1-5, where 1 is strongly disagree and 5 is strongly agree? A I care about animal welfare, but it's too time consuming to look for welfare friendly products; B I care about animal welfare but cannot find welfare friendly products where I shop for food.

[18] Continuing with eggs, are the following factors very important, fairly important or not important at all? A. Low price. B. Organic. C. Treatment of the hens. Now thinking especially of beef, are the following factors very important, fairly important or not important to you? A. Low price. B. Treatment of the animal. C. Slaughtering methods. D. Raised outdoors for part of the year

The questionnaire also included two questions about the importance of price when purchasing eggs and beef, respectively (Table 3.3). When comparing the proportions saying price is 'very important' when buying eggs and beef, we find Hungary (38 per cent) at the high end regarding beef and France (33 per cent) ranking highest regarding eggs. We find Sweden ranked lowest for both questions, in close company of Norway. Country variations may at least partly be a reflection of different levels of income.

While phrased in different ways, the sets of questions on availability and price both refer directly to the respondent's purchasing practices. Compared to the levels of concerns for availability, the answers indicate that price is considered less important when buying eggs and beef.

Concerns about farm animal welfare within the market context are considerably lower, compared to opinions about people's general interest in the issue. However, and more surprisingly, there is higher engagement when specifically asking about shopping for eggs and meat than when asking about shopping in general. Treatment is somewhat more important, slaughtering somewhat less, outdoors in the middle.

There are considerable national variations in the levels of engagement and worry as well as in terms of which conditions (and foods) are receiving most attention. Least engagement among consumers is found in Hungary, except for eggs. The Hungarian provisioning of eggs is special, linked to very small-scale production and a considerable proportion distributed via informal networks. Interest in farm animal welfare is not that much associated with shopping for food in Norway either. Availability is low even there, but lack of availability alone cannot explain this. Further analyses will explore how this low consumer involvement may be related to, for example, a particular societal distribution of responsibility for farm animal welfare in Norway. Engagement as consumers is higher in the other countries, with the highest levels found in France and the Netherlands.

3.5 THE TRUTH-TELLING OF INSTITUTIONAL ACTORS

Trust and distrust in organizations and institutions influencing food and animal welfare was assessed with a battery of questions about whether 10 different actors would tell the whole truth, only parts of the truth, or give misleading information in the case of an animal welfare scandal.[19] Two main points come out of this (Table 3.5).

[19] Imagine a scandal concerning the welfare of chickens in your country. Do you think that each of the following would tell you the whole truth, only tell you part of the truth or would give you misleading information? Press, television and radio / The food processing industry / Food retailers / Farmers or farmers groups / Consumer organizations watchdogs / Animal protectionists / Politicians / Public food authorities (like the Food Standards Agency) / Independent food experts (e.g. academics) / The EU.

TABLE 3.5 Truth-telling in case of a scandal with animal welfare (% answer 'tell the whole truth').

'The whole truth'		HU	IT	FR	UK	NL	NO	SE	Total*
Civil society	Mass media	18	13	11	14	21	27	27	19
	Consumer org	49	50	53	59	63	58	52	55
	Animal protectionists	66	55	54	30	54	52	35	49
	Food experts	62	48	42	44	71	56	48	53
Public authorities	Politicians	6	3	2	3	8	7	5	5
	(National) food authorities	53	34	27	35	57	60	46	45
	EU	36	21	9	12	18	10	9	16
Market actors	Food processors	11	6	5	8	7	6	10	8
	Food retailers	7	6	10	10	13	7	10	9
	Farmers	24	9	15	24	27	19	24	20

Notes: Imagine a scandal concerning the welfare of chickens in your country. Do you think that each of the following would tell you the whole truth, only tell you part of the truth or would give you misleading information? Press, television and radio / The food processing industry / Food retailers / Farmers or farmers groups / Consumer organizations watchdogs / Animal protectionists / Politicians / Public food authorities (like the Food Standards Agency) / Independent food experts (e.g. academics) / The EU (weighted, 1500 each country, don't know excluded); * total for 7 countries, not weighted for country size. Total mean is calculated as the mean of the country averages.

First, the overall proportions saying that actors in the food system would tell the whole truth vary considerably between countries. The Hungarians and the Dutch seem to be generally the most trusting, while the British, the Italians and the French display the lowest levels of belief in the truth-telling in institutional actors in this case of animal welfare. It is important to keep these overall levels of trust in institutional actors in mind, as they indicate the degree of trust in organizations and people they don't know personally and where their own experience is limited (Kjærnes et al., 2006). Effective communication in the forms of for example campaigns and labels requires that people trust the actors involved in the communication. Likewise, for people to participate and take on responsibility will require a certain level of shared norms and expectations. Other actors must be believed to contribute, be competent, reliable and not follow their own goals and interests too much at the cost of consumers' and common interests. In settings where such types of relations are not established and institutional distrust is more prevalent, people may instead rely on limited personal relations and local networks that refer to long-term experience and familiarity rather than on abstract organizations such as supermarket chains, expert bodies or food authorities.

Second, in all countries there is a clear differentiation between the various types of actors. The civil society grouping rank highest, while public authorities form a middle group, and market actors are the least trusted group. Food experts, consumer organizations and animal protectionists (civil society actors) generally receive most trust in this case of truth-telling. Food authorities are not often believed to tell the whole truth, but not to give misleading information either. EU institutions are generally less trusted than national authorities. Retailers, the processing industry, and farmers (market actors) are much more rarely believed to tell the whole truth and often to give misleading information. Politicians rank lowest.

From these ranking orders we can see that people generally make sharp distinctions between actors with different roles, capacities and interests, basically between civil society actors, public authorities, and market actors. These three groups are different in terms of their tasks, their roles regarding openness and independence, as well as in their type of influence and power:

- Civil society actors are more or less defined by their independence from economic interests and from authority control (even though that may at times be problematic in practice). It means that they benefit from openness, in many cases demonstrating their independence, on which their influence is based, as they will often not have the economic power or the authority to sanction like the other two types of actors have. On the other hand, because attention is so important, such actors may be mistrusted in terms of, for example, exaggerating a problem or – in the end – not being as independent as they claim to be (for example, receiving economic support from a particular company or industry branch).
- Public authorities may be expected to have the power to regulate and sanction. In classical terms, they are generally expected to represent a 'third party' that can protect common interests in relation to, for example, market actors. They are, however, not always believed to live up to this role and are being criticized, partly, for being too heavily influenced by powerful interests in society, and for being too concerned with their own power and prestige.
- Finally, commercial actors are often expected to put their own business interests before anything else. Information will then be carefully managed, so that these interests are not hurt (thus affecting their truth-telling capacity). Not all market actors are necessarily placed in this category. For example, farmers can be seen as taking on a different role as somebody who is committed not solely to competitive business concerns. Or the food industry can be seen to make significant contributions to the level of welfare in society. Today, many food companies are struggling to establish an image that goes beyond economic competition – for example, through corporate social responsibility schemes. Animal welfare may become part of such schemes (Roe, 2006).

Considering such typified roles, it is not surprising that we find people making these distinctions. A very similar pattern was also observed in a study of consumer trust that focused mainly on food safety (Poppe and Kjærnes, 2003). Yet, it is important to recognize that there are considerable variations in the levels of trust observed in these two studies. Trust seems to vary between different food issues and it may change over time. Important for our further analysis of consumers and animal friendliness is, however, that there are considerable differences between the countries, indicating that the roles of various institutional actors as well as their performance may differ considerably.

In order to explore this a bit further, we have constructed additive indexes;[20] first, an index including all ten variables 'truth-telling' (Table 3.6) and, next, a set of three indexes

[20] The procedure for computing the indexes is as follows. First, the values of each variable (indicator) included in the indexes are coded as: 'give misleading information' = 0; 'only tell you part of the truth' = 1,

TABLE 3.6 Average truth-telling (additive index, standardized, varying between 0 and 100, consisting of 10 indicators).

Country	Mean	N	Std. Deviation
Hungary	60	1046	15.715
Italy	51	1200	17.260
France	52	1465	14.589
United Kingdom	49	1304	16.777
Netherlands	59	1348	15.506
Norway	57	1304	15.358
Sweden	55	1336	15.109
Total	55	9003	16.158

Note: Total for 7 countries, not weighted for country size; total mean is calculated as the mean of the country averages.

referring to the three groups of actors; 'civil society' (4 indicators), 'authorities' (3 indicators) and 'market actors' (3 indicators) (Table 3.7). Table 3.6 shows that when we consider the whole distribution of answers, not only the proportions who would tell the whole truth, we get a slightly different picture from what was presented in Table 3.5. Considering all actors together, it appears that the Hungarians have the highest expectations of truth-telling. The overall indexes are high even in the Netherlands and in Norway. The lowest index score is found in the UK. Compared to the other countries, scores are low even in Italy and France.

If we then turn to the indexes for the three types of institutional actors, the overall impression already mentioned is confirmed. In an animal welfare scandal, people generally believe actors representing civil society to tell the truth (Table 3.7). In this case of truth-telling, public authorities are ranked a little higher than market actors, but the difference is not very clear. Table 3.7 shows Dutch respondents to have highest trust in civil society actors, with an index score of 72. Even the Hungarians and the Norwegians have high scores here. The British respondents have the lowest score with 59, but even the Italians and the Swedish have relatively low scores for trust in civil society actors. Looking back at Table 3.5, we see that the low scores in the UK and Sweden are mainly due to their low trust in the truth-telling of animal protection organizations. The most remarkable feature in the Netherlands in this regard is its high trust in food experts.

Regarding trust in authorities as truth-tellers, the Hungarians score highest (58), followed by the Dutch and the Norwegian respondents. At the other end of the scale, we find that the French, again together with the British, have the lowest score at 42. Even Italian respondents score rather low. The institutions included in this index are very diverse in terms of trust, with national food authorities generally scoring rather high, while few trust that politicians and EU institutions would tell the whole truth. Still, it seems that in many cases these scores point in the same direction within one country when compared to the

[20] *cont.*: 'the whole truth' = 2; don't know is excluded. Second, after computing the four additive indexes, the 'truth-telling' index consisting of 10 variables will vary between 0 and 20; 'civil society', consisting of 4 variables, will vary between 0 and 8; and the two latest indexes, 'authorities' and 'market actors', consisting of 3 variables each, and will vary between 0 and 6. Third, in order to have the possibility of comparing these indexes with each other, all indexes were standardized and adjusted to vary between 0 and 100. The mean can be interpreted as average scores.

TABLE 3.7 Average truth-telling, three dimensions (additive indexes, standardized, varying between 0 and 100).

		Civil Society 4 indicators	Public Authorities 3 indicators	Market actors 3 indicators
Hungary	Mean	71	58	47
	N	1233	1182	1318
	Std. Deviation	19.032	21.011	20.752
Italy	Mean	65	46	36
	N	1341	1312	1368
	Std. Deviation	20.810	22.137	22.905
France	Mean	66	44	43
	N	1480	1488	1487
	Std. Deviation	18.707	19.771	20.558
Great Britain	Mean	59	42	44
	N	1399	1406	1409
	Std. Deviation	21.483	22.852	22.366
Netherlands	Mean	72	54	46
	N	1434	1417	1423
	Std. Deviation	19.091	22.567	22.052
Norway	Mean	69	54	45
	N	1385	1398	1411
	Std. Deviation	20.970	19.586	20.960
Sweden	Mean	63	50	50
	N	1390	1430	1434
	Std. Deviation	20.394	20.416	20.373
Total	Mean	66	50	44
	N	9662	9633	9850
	Std. Deviation	20.488	21.864	21.776

Note: 'Civil society' includes: press, television and radio / consumer organizations/watchdogs / animal protectionists / independent food authorities; 'Authorities' includes: politicians / public food authorities / the EU; 'Market actors' includes: the food processing industry / food retailers / farmers or farmers groups (total for 7 countries, not weighted for country size, total mean is calculated as the mean of the country averages).

other countries. For example, the French and British respondents show less trust in their public authorities than respondents in many of the other countries when it comes to animal welfare. Relatively speaking, they also score lower on trust in EU institutions and politicians.

When it comes to trust in market actors as truth-tellers, the Swedish rank highest at 50 while Italians are at the bottom with 36. The rest of the countries come out as quite similar, with scores between 43 and 47. As already mentioned, all market actors rank low in terms of whether people believe that they would tell the truth in case of a scandal with animal welfare. The internal ranking is also quite consistent, with the farmers somewhat more trusted than retailers and the processing industry (Table 3.5). When dealing with an issue like animal welfare, this is not unimportant. Perhaps we here can see a parallel to the higher worries for the treatment of animals during transportation and slaughtering than for the rearing of the animals.

In general, we find that people across Europe are quite sceptical when it comes to the truth-telling of institutional actors. There is some variation in the levels of belief in truth-telling, but the ranking of the actors is quite similar. Politicians, the processing industry and retailers are most often believed to give misleading information, while very few think that they tell the whole truth in the case of a scandal with animal welfare. The role of market actors can not be disregarded, of course, when it comes to the improvement of farm animal welfare. But in terms of the trustworthiness of information, independent parties are important. The only type of actor in which a majority in all countries believe they would tell the whole truth are consumer organizations. But then, these organizations are rather marginal when it comes to dealing with animal welfare issues. It is probably more important that other civil society actors, such as food experts and animal protectionists, are often trusted to tell the whole truth in case of a scandal with animal welfare for chicken, and they are rarely believed to give misleading information. Food authorities are often believed to tell only parts of the truth, but rarely to give misleading information. Even though not having an unambiguous position, this seems important for developing trustworthy programmes for animal welfare standards, monitoring and information.

For our further analyses, the observed national variations are interesting. Generally, the Hungarians, Norwegians and Dutch seem to be the most trusting when it comes to farm animal welfare, while the British, French and Italian respondents display the lowest levels of trust in truth-telling. The British (and the Swedes) seem to be the most selective, with higher trust in some actors, lower trust in other actors. This variation is not a direct reflection of the degrees of worry over animal welfare conditions, as described in previous sections.

3.6 CONCLUDING REMARKS

Farm animal welfare is clearly an important issue for ordinary people across Europe. Our findings confirm earlier studies in that respect. However, emphasis or interest, on the one hand, and worry, on the other, are not the same. A majority is actually quite optimistic regarding recent trends. Worries are unevenly distributed across the seven countries. There are also considerable proportions unable to assess the situation and say they don’t know. National contexts may influence people’s specific experiences, general evaluations of performance, as well as media attention. But worries (and saying they don’t know) may also reflect an underlying uncertainty and scepticism towards the handling of farm animals in contemporary food provisioning systems.

Although to a more limited extent than this general interest, many Europeans think about animal friendliness when shopping for food. Even here, earlier studies are confirmed. Variations in the association between concern and involvement as consumers indicate that taking on responsibilities does not necessarily follow from individuals’ expressed interests and their ethical considerations. The distribution of responsibilities between consumers, various market actors and the state can be very variable from one country to the next. This is a political and ethical issue, but even practical questions must be considered. Taking on responsibility as a consumer must be associated with the possibilities to act. Availability and sufficient, reliable information, to some degree even affordable prices, are therefore crucial for animal welfare to be considered as part of daily routines. We find that availability can be a considerable problem in several, but not in all the seven countries. Price is also an issue, but judged by the survey results to a lesser extent than availability. We are a bit hesitant to conclude from our findings that price is of little importance. It may well be that the overall framing of the interview, focusing on animal welfare concerns, has made many respondents reluctant to say that price is important.

Making 'responsible' purchases will depend on what people mean by animal friendliness. We find that the emphasis on animal friendliness when shopping for eggs and beef is generally much higher than the market shares for labelled products. Supported by findings from the focus-group interviews, people's understanding of animal-friendly food items seems to be much wider than referring to items that are labelled as particularly animal friendly.

People's engagement is also a matter of trust in those who provide and control the food and in information sources. The widespread belief that food providers will not tell the whole truth and that many of them will give misleading information, probably expresses a general expectation that such actors will act strategically to protect business interests in case of a scandal. Thus, independent monitoring and information seems crucial. Animal welfare organizations and food experts are generally trusted (if not everywhere), but they may not always have the resources needed to take on such tasks alone. To the degree that food authorities take this third party role, which they often do, trustworthiness will therefore depend on their ability to demonstrate independence and openness, through transparency, the use of independent expertise, etc. At the moment, people's assessment of their ability to do so varies considerably across Europe.

These analyses indicate common features in public opinions about farm animal welfare across Europe. But there are also noticeable national differences. These similarities and differences will be explored further in later analyses, where other survey questions as well as data from other parts of the Welfare Quality project will be employed.

4

THE EATER, THE BUYER AND FARM ANIMAL WELFARE*

4.1 INTRODUCTION

Europe has seen an increasing focus on animals, how they live and their relationship to humans. In particular, as judged from public discourse, social mobilization and policy initiatives, farm animal welfare seems to have emerged on the public agenda as a social problem, a problem that society needs to address (Blokhuis et al., 2003). This is also reflected in commercial initiatives, with a number of schemes aiming at market differentiation or improved reputation and legitimacy. Opinion surveys indicate considerable public concern about how animals in food production are treated (European Commission, 2005). An important characteristic of current debates is that problems of animal welfare and, in particular, their solutions are being associated with what people do as 'consumers'. Using public opinion data, the purpose of this chapter is to explore this particular perspective, the relationship between domestic animals and their treatment, on the one hand, and people in their capacities as buyers and eaters, on the other.

As domestic animals are kept for human use or exploitation, their well-being is to a large extent dependent on how they are treated by humans. Ingold (1994) contains that with the emergence of pastoral societies, humans' relationships with animals shifted from being based on a principle of trust to that of domination – humans may care for animals, but that does not necessarily question the human is the master. Others have emphasized that domesticated animals become part of an object-world, a 'thing'. With a growing recognition of animals' sentiency and capacity to suffer, Decartes' notion of 'animal machines' is challenged. But that does not rule out the issue of domination. There are tensions between caring for farm animals and other types of human concerns, including those implied by the market context of animal production (Buller & Morris, 2003), as well as concerns related to the use as food, such as hygiene and taste. While the conflicts implied have been spelled out for example in the animal rights movement (Singer, 1985), there is a strong tendency to focus on a 'pragmatic' balancing of human and animal needs where the issue of domination is less contested. This is for example reflected in a moral discourse, where philosophers point to the ethical responsibility of individuals to consider even animal welfare in the choices they make (for example, see Korthals, 2004). The moral

* An earlier version of this chapter was published in French.

focus on people's responsibility is also indicated by a number of economically framed studies where farm animal welfare is (perhaps somewhat paradoxically) seen as a 'product attribute' along with taste and price, where priorities are reflected in demand (for example, see Bennett and Blaney, 2002). A common assertion is that many people are concerned but do little in practice. The dominant explanation reflects this idea of a balancing process, where self-interest has come to dominate too much. The social problem of farm animal welfare is framed as a matter of consumers' reluctance to pay for better animal welfare. This means that the problem is brought a long way – from the farmer to the other end of the food chain.[21] The main measure for improvement is to convince and educate people to take more responsibility through their purchases and, when they do, the market – and animal production – will react appropriately.

There is a long tradition in the social sciences of criticizing the 'economic man', the self-interested individual who makes rational decisions. But few contributions seem to have discussed this with reference to animals and animal welfare. Regarding animals, attention has been directed towards issues such as principal rights of animals as subjects or semi-subjects, the near-human like relationships that people develop with their pets, and animals in relation to perceptions of nature and the wild (Buller and Morris, 2003; Tovey, 2003). When talking specifically about the well-being of farm animals, there is little discussion of the character of human–animal relationships through food and the acts of purchasing, preparing and eating food. If brought up at all, the reference is, paradoxically, often to a decontextualized 'consumer', implicitly a rational purchaser, thus recognizing the market context, but without challenging an economic understanding of consumption. We contain that farm animal welfare should be considered as formed by the specific character of commercial food production, but, at the same time, recognizing that human–animal relationships through food production and consumption are more than economic relations.

Human–animal relations and transformation processes from live animals to food are generally taken for granted, normalized. What we are looking for is, first of all, to what degree the legitimacy of animal treatment and eating meat are questioned. Do we see indications of a process of 'opening up'? One might suggest two different aspects of opening up. One follows from or is indicated by farm animal welfare emerging as a social problem, namely that the problems are moved from a private to a public sphere. Whereas farm animal welfare has been (and partly still is) an issue mainly for farmers, to some degree for veterinary inspectors, the issue is increasingly problematized and politicized, questioning, for example, the size of the problems, what is good for the animal, possible venues for improvement, etc. The social division of responsibilities is important. Unlike the issue of pets, ordinary people are involved only indirectly in this case, in their roles or capacities as citizens and buyers. But there is also another kind of opening up that follows from the particular ways in which human–animal relations via food have been institutionalized, strongly based on separation. That is, the effects that attention and problematization may have on the implicit, normalized ways in which animals are transformed into food, disclosing and reminding people of issues that may involve ethical

[21] Within an economic paradigm, this follows logically from an understanding of the market as 'consumer driven' and the idea of the sovereign consumer, whose demands and preferences are reflected perfectly in supply.

dilemmas and classificatory difficulties. This aspect refers more to people as eaters. This chapter will explore these two aspects of 'opening up' by asking to what degree farm animal welfare is a matter of concern in public opinion across Europe. Do people make links between purchases and the well-being of farm animals? How are associations between eating and the animal welfare expressed? Do purchasing and/or eating constitute relevant arenas for action regarding farm animal welfare? The assumption is that the involvement of people in the issue of farm animal welfare – as citizens, buyers and eaters – will vary across Europe, depending on market and regulatory arrangements as well as cultural traditions in relationships to food and to animals.

The chapter will discuss first some structural and institutional aspects of human–animal relations through food in contemporary society in some more detail. Empirically, the analysis is based on public opinion surveys from seven European countries. After having described the data material, we will first address how farm animal welfare appears as an issue in public opinion across Europe. We then move on to explore in how and to what degree that is related to food consumption activities.

4.2 TURNING LIVE ANIMALS INTO FOOD[22]

Meat is a basic part of our dietary custom in Europe. As food, meat has a materiality, with nutrients, a texture and a smell. But making items edible, something that can be ingested, incorporated into our bodies, is a social process, strongly regulated through organization, norms and classifications. The question of the relationship between animal and humans, and above all killing for food, has been the object of significant work in sociology and ethnology (Leach, 1980; Vialles, 1987; Fischler, 1990; Fischler, 1998; Méchin, 1998; Poulain, 1998). To be edible, the animal must not be too close or too far away from humans. It is first of all the middle categories, game and domesticated animals, that are classified as edible, while animals categorized as 'wild', on the one hand, and pets, on the other, are problematic (Leach, 1980, pp. 263–297). Ambiguity about classification can also make animals inedible (Douglas, 1970). But there are important distinctions even within this classificatory system depending on degrees of proximity. Vialles (1987) points to two significant approaches, the 'zoophagic' and the 'sarcophagic'. A zoophagic person distinguishes clearly between animality and humanity and eating meat is generally no problem. For the 'sarcophage', meat can only be conceived as edible if the origin of the flesh is hidden where the very 'animality' of the animal is diminished or has completely disappeared. Fischler takes this idea further by exploring the mechanism used to hide the animal origin of meat products in modern cooking. He shows that culinary and breeding vocabularies are used in the process of animal classification to hide the nature of the

[22] The following is largely based on Kjærnes (2005), which in turn presents a collaborative effort with significant inputs from M. Miele, M. Korthals, J.-P. Poulain, L. Petterson, R. Bennett, and C. Cowan. See also Kjørstad (2005).

animal. This is why English-speaking people raise sheep and calves but eat mutton and veal. A number of efforts in the marketing of meat can be understood from this perspective, where textual and image reminders of the origin as a live animal are often avoided (especially the context of intensive, industrial farming). It is suggested that the French are less concerned by the 'sarcophagic' than are Northern Europeans.

But edibility is also related to the treatment of the animal and, in particular, to how it is killed. This cannot take place without certain symbolic precautions. In order to understand the process of legitimizing the killing of animals for food one must take into account the mythic and religious domains. Poulain points to how this is constructed in different types of societies, where three main situations can be distinguished: hunting societies; shepherd or farm-raising societies, which establish a privileged link with domesticated animals; and neo-technical modern societies (Poulain, 2002). In hunting societies, there are numerous examples where prayer or even excuses are addressed to the soul or the spirit of the animal. A second attitude is killing the animals in a sacrificial framework. In pastoral or agricultural/breeding societies, the domestic animal is often used with divine authorization. Certain rituals reassure the eater by making the death of the animal morally acceptable and thereby not a source of anxiety since the killing is done by a representative of and under the auspices of God. This helps to legitimize and make the killing of animals for food acceptable. In modern Western societies, the killing of animals for food, performed under a non-religious or lay domain, is due to Christian influence. Animal production is particularly significant in the modernity of foods. Broken down to its simplest primary ingredients, meat becomes de-animalized and devitalized. 'In the food business, the animal has become an object or rather less than an object: just stuff' (Fischler, 1990, p. 133). A Taylorist slaughtering process, organized as an 'assembly line', dilutes the responsibility for killing, while at the same time reducing the animal symbolically down to just a piece of meat, to dignify it (Vialles, 1987).

While there is a 'thingification' and 'de-animation' of meat, there is a sort of paradoxical compensation going on at the same time, where the living animal in its 'natural state' finds itself personified and anthropomorphized. Scientific developments, like in the discipline of ethology, bring to light the complexities of animal behaviour, contributing to the transformation of the modern image of the animal which is imbued with intelligence and capable of feeling emotions. For ordinary people, pets are often personified, gaining a particularly elevated status and become the object of exorbitant attention (Franklin, 1999). They literally become part of the family. There is an identification between the pet and humans and a projection of human needs onto the animal. Animals are attaining a status as subjects (or semi-subjects, Kjærnes and Guzman, 1998) with an independent status, rather than merely as objects for human exploitation. Whales are to be saved from hunting because of their particular individuality. In the public sphere, this is most clearly expressed in mobilization for the rights of animals in experiments, entertainment, and food production (for example, see Singer, 1985). These phenomena of 'personification and thingification' may be seen as a sign of the ambivalent status of animals in modern society, questioning humanity place in nature and the natural order of the animal species and making the killing of animals for food difficult to deal with. The recent 'mad cow' crisis is a revealing case in point.

But the issue of animals and their well-being should not be seen in isolation. Transformations are taking place in the technologies and organization involved in food production, affecting significantly the social relationships involved. Issues of legitimacy currently appear high on the agenda in the area of food, framed as 'food ethics', distrust, or a 'quality turn', and being reflected in political consumerism, regulatory reforms, and 'alternative' distribution systems. The questioning of the well-being of farm animals may be seen as part of these processes (Blokhuis et al., 2003; Korthals, 2004). The system of production and distribution of animal foods has changed significantly, with a new wave of professionalization, as well as shifts in the ways we understand what food and 'good food' are. Therefore, cultural influences regarding human–animal relations (such as the personification of animals) as well as characteristics of food provisioning systems as such seem to produce an opening-up regarding the societal handling of animals for food, questioning norms and classifications as well as organizational procedures. What is going on behind the walls of abattoirs? And can we eat eggs from hens kept in tiny cages? Are modern, scientific methods for animal disease prevention good for the animal – and good for us? Such questions may refer not only to expectations that we as buyers and eaters have towards animal production, where eating meat becomes contingent on how animals are treated (Kjærnes and Guzman, 1998). They may also lead to (or indicate) a re-emergence of deeper ethical dilemmas involved in turning live animals into food in modern societies, thus questioning the legitimacy of killing animals for food, the edibility of meat.

Basic dilemmas and contingencies such as these are handled by and embedded in social institutions that normatively and organizationally regulate food production and eating: markets, families and states. The separation of live animals and food is not only a matter of symbolic distinctions. In modern societies, food consumption is typically spatially separated from animal rearing, transportation and slaughtering, and very few will have any direct experience of or control over the treatment of livestock. This division of labour between social institutions implies specialization of knowledge, complex organization and division of responsibilities (for example, see Fine, 1998; Green et al., 2003). The number and types of economic agents involved in interdependent exchanges is large and changing, with immense complexity of technologies and provisioning systems. Importantly, the proportion of labour with food undertaken by commercial actors is increasing. This means that the end-user, the buyer and eater of foods and dishes posits less and less direct control of what happens with the food – and with the animal. At the same time, however, organizational efforts to ensure predictability and accountability are growing immensely. While direct control by the buyer and eater has diminished, (indirect) organizational control is increasing. Any market exchange between suppliers and consumers is characterized by asymmetries of power and information, but also by mutual dependency. The suppliers depend upon selling the food. But there is always the possibility of misuse of power, both in terms of free riders and a more general disregard of consumer concerns and interests. This makes trust a crucial issue (Kjærnes, 1999). A basic feature of consumer trust is the, usually implicit, assumption that the supplier will live up to shared norms and expectations associated with the various issues linked to food and in regard to what the supply side should do and take responsibility for. Scepticism may reflect basic uncertainty and ethical dilemmas. But it may also represent more direct distrust in food institutions regarding their capability and willingness to treat animals well.

Shifts in the division of labour and responsibility do not imply that the activities of purchasing, cooking and eating (or 'consumption') are unimportant. Such activities constitute significant and meaningful elements of everyday life in terms of satisfying physical needs, maintaining social relations, as representations of identity and cultural rituals, etc. They represent habitual, tacit ways of handling uncertainties and dilemmas associated with food, including those associated with animal welfare and slaughtering. Food related routines are formed in complex interrelations with the supply side, with particular divisions of labour and distributions of responsibilities and power, and with shared (or contested) norms and beliefs concerning food consumption as well as animal welfare. Shopping and preparing local, fresh products from a familiar butcher imply very different interrelations from those involved when buying pre-packaged ready-made dishes from a large supermarket chain with integrated supply chains and global sourcing. People's agency as consumers, through their shopping practices or by claims-making in public and political arenas, is framed and influenced by such conditions (Kjærnes et al., 2006). At the same time, these different types of social relations will imply quite distinct classificatory and normative processes in the transformation of animals to food.

The acknowledgement of institutionalization processes involved in the production and consumption of foods of animal origin forms the background for the comparative approach applied in this empirical analysis. Such processes are important for understanding the concrete context of our everyday lives, our experiences and histories, and acknowledging them can help to understand variations, tensions and conflicts, as well as change (or lack of change). A comparative perspective can help to reveal conditions and processes that are taken for granted and normalized within one particular setting. Through this exercise, we hope to get insight into the issue of farm animal welfare as seen from the perspective of the buyer and eater of food.

4.3 DATA AND ANALYSES

The analysis is based on the survey data from seven European countries. The design and methodology of data collection are outlined in Chapter 2. The data are treated mainly as public opinions at an aggregate level, searching for response patterns characterizing the various countries. This allows a discussion at an institutional level and combination with other sources of information, rather than searching for mechanisms at an individual level – for example, links between attitudes and behaviour. Analyses presented in this chapter are primarily based on univariate frequency distributions compared between countries.

Several of the data have already been presented in tables and figures in Chapter 3. While the aim of the earlier chapter was to describe the situation regarding public opinions towards farm animal welfare, the purpose of this chapter is to utilize the data as part of a specific kind of argument. Data are presented with reference to Chapter 3.

4.4 THE ISSUE OF 'FARM ANIMAL WELFARE'

The well-being of farm animals emerged as an issue of concern in the early 1990s and seems currently to be of importance to many Europeans (Bennett, 1995, 1997; Hughes, 1995; Magnusson et al., 2001; Miele and Parisi, 2001; Berg, 2002). Even in our study, we find generally positive responses to a question about the interest in farm animal welfare. Figure 3.1 in Chapter 3 showed that, across the seven countries, very few say that farm animal welfare is generally of little or no importance to them. A clear majority in all countries appear in the two most positive response categories (4 and 5). The French and Dutch seem to be somewhat less interested (65 and 69 per cent in these categories, respectively), the British are in the middle, while Hungarian, Swedish, Norwegian, and, ranking highest, Italian respondents are very enthusiastic. This does not necessarily tell us about intense engagement, but it does indicate consensus around good treatment of farm animals as socially desirable across Europe.

Saying that an issue is important does not automatically imply concern and worry. We asked a question about whether the respondents think that welfare conditions have improved or deteriorated in their own country.[23] This is a question that may be linked not only to whether people see a need for action on their own behalf, but also to trust in those actors that are involved in meat production and those that monitor and control these processes. Overall, most respondents believe that farm animal welfare has improved over the last 10 years in their own country (see Figure 3.3). The proportions saying that conditions have 'improved' range from 55 to 69 per cent, the only exception being Hungary. Only minor proportions think conditions have deteriorated. This optimism about trends in farm animal welfare is in accordance with earlier findings that, when asked about issues such as food safety and nutrition, more people tend to be optimistic about changes in modern food provisioning, compared to those who are pessimistic (Poppe and Kjærnes, 2003). In (Western) Europe, a majority seems to believe in the abilities of modernization in the food sector when in comes to solving problems like safety and animal welfare. But the proportions being more critical should of course not be overlooked. Moreover, about one third to one fourth of the respondents say that there have not been major changes, with the highest proportions (after Hungary) in France and the UK. This mid category is not necessarily a neutral position. No change may also indicate that conditions are believed to be as bad – or as good – as before.

Therefore, we asked a series of questions related to the rearing of specific species as well as conditions in animal transport and slaughtering. The answers indicate that in spite of the optimism, there are also worries. Overall, the conditions for chicken are met with most worry (see Table 3.1). With the exception of Hungary, 40–57 per cent regarded conditions in chicken production as poor or very poor. In the case of pigs, few respondents in Norway and Sweden assess the situation as poor or very poor, while more than 40 per cent are

[23] In general, over the past 10 years, do you think that farm animal welfare in your country has improved, is about the same or has got worse?

concerned in France and the Netherlands. Few utter worries about dairy cows. Considering all three species together, we see that Norway, Sweden and Hungary cluster at the bottom regarding overall worries about farm animals' living conditions. In Norway and Sweden, very few worry about pig and dairy productions, while even there chicken rearing causes considerable concern. More widespread worries are found in the UK and Italy. The highest levels are found in France and the Netherlands, mainly because they are considerably more concerned about pig production than in the other countries. If we turn to methods of transportation[24] and slaughtering,[25] we see more worry (Table 3.1). When merging the proportions of the two most critical answer categories (1 and 2), we find that more than 40 per cent are worried for both issues. The exceptions are Norway and Sweden, where the proportions are much lower. In all countries, the conditions in transportation cause more worry than the methods used at the abattoirs. Respondents in Italy and Hungary have the most negative evaluations of welfare conditions in association with transportation and slaughtering.

Overall, we see highly diverse patterns of concern. Italians appear to be most worried, particularly with regard to transportation and slaughtering. Worries are widespread even among French and Dutch respondents, but they are, compared to the Italians, more concerned with the rearing conditions. Hungarians' concerns concentrate on transportation and slaughtering methods, while considerably fewer say that rearing conditions are unacceptable from an animal welfare point of view. Norwegian and Swedish respondents are consistently less worried for all these aspects of farm animal welfare. Apart from the rearing of chicken, few Scandinavians think that welfare conditions are poor.

Modern food provisioning will rarely imply that people can make judgements about how farm animals are treated based on own experiences. Even though we may care, institutionalized separation implies little direct contact; we know little and we are rarely reminded of what is going on. Our results indicate that not everybody is able or willing to make judgements about the treatment of animals. The number of respondents answering 'don't know' is fairly high regarding all the specific questions about the living conditions of farm animals (Table 3-2). For other questions in the questionnaire, the proportions of 'don't know' are around 1–2 percent. For these special questions, the proportions of 'don't know' are particularly high in Hungary and Italy. For example, in the case of slaughtering methods, 28 per cent of Hungarians and 26 per cent of Italians don't know whether the methods used in their own country are acceptable. Sweden and the UK form a middle group, while the Netherlands, Norway and France consistently have the lowest 'don't know' rates. These high levels of respondents who answer 'don't know' indicate that quite a few people have difficulty in assessing the welfare status of farm animals and lack of knowledge and reflection may be an important reason for that.

If we consider the general importance put on animal welfare in relation to expressions of worry and uncertainty, we find that while the French and Dutch consider farm animal

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[24] And, what about the methods used to transport animals in your country, using the same 1–5 scale, where 1 is very poor and 5 is very good?

[25] And, in your opinion, how well do you think the animals are treated at the slaughterers in yor country on a scale of 1–5, where 1 is very poor and 5 is very well?

welfare in general to be of somewhat less importance to them personally, compared to respondents in the other countries, they appear at the same time to be more worried about conditions in their own countries. The opposite effect occurs when Norwegians, Swedes and Hungarians claim animal welfare in general to be an issue of great personal importance – but at the same time being less worried about farm animals' living conditions in their country. In comparative terms, there is most agreement between the importance put on farm animal welfare in general and worry about farm animals' living conditions among British and Italian respondents. But, overall, interest and optimism is shared by respondents across the seven countries (except for less optimism in the transition country Hungary), with considerably larger variations when it comes to judgements about specific conditions. Variations in concern may of course be based on well-informed judgements of the status regarding animal welfare; perhaps farm animals are treated better in Scandinavia? But varying responses may as well be influenced by recent media attention, diverging conceptions of various animals, as well as the particular character of the various industries. For example, while Hungarians are generally more worried and pessimistic, they judge conditions for chicken to be relatively favourable. To most Hungarians, chicken rearing refers to backyard and small-scale farming, with relatively close contacts between animals and humans. This is very different from the general ideas of chicken production as the most 'industrialised' industry.

As already mentioned, a number of efforts are currently being made by market and political actors to implement measures to improve farm animal welfare. What this survey indicates is that these efforts have a backing in public opinion. Perhaps surprisingly, most people seem to believe in the existing systems' own abilities of improvement. Seen in that perspective, it is difficult to assess to what degrees the worries and criticism reflect a deeper process of questioning the institutionalized handling and transformation of animals into food. It is also a question to what degree people see the need, and possibility, for involvement. In the next section, we will take a closer look at how people see animal welfare as associated to purchasing and eating.

4.5 CONSUMING ANIMALS?

Meat eating has been challenged seriously in recent years. The various scandals involving the meat sector and debates in the mass media may have been an awakening factor, followed up by an increasing amount of legislation to improve the welfare of farm animals within the EU. Many people are sceptical towards eating meat with reference to a range of topics, such as safety and environmental issues as well as basic problems of eating foods that involve killing animals (see Kjærnes and Guzman, 1998; Miele and Parisi 2001; Magnusson and Koivisto Hursti, 2004; Lavik and Kjørstad, 2005). Scepticism may be reflected in changes in market demand, but not always and in all cases. Consumption statistics show significant drops following the BSE crisis in Italy, France and the UK, particularly for beef. In other countries, such as Sweden, the Netherlands and Norway, concerns were hardly reflected in demand at all (Kjørstad, 2005). Comparative studies indicate that trust in actors in the food sector may at least partly explain these differences (Miele and Parisi, 2001; Poppe and Kjærnes, 2003). Even where changes did occur after the BSE crisis, these short-term shifts rarely translated into long-term trends. This combination of fluctuation and stability may reflect the complex character of meat eating, with conditionality as well as deeply structured, tacit routines.

Transforming live animals into edible foods involve basic socio-cultural normative constructions. But expectations and judgements are also formed within the frames of daily routines and experiences, in interaction with our nearest and dearest, but also, importantly, with major food institutions, civil actors and networks. None of this can be reduced to one activity or context, like purchases or meals or public food discourse. Food habits and 'consumption' represent a complex set of activities, involving a range of institutional contexts and sets of norms. We buy food in shops and markets (or acquire it elsewhere), bring it home and prepare it or store it, and we serve and eat the food in the form of meals with dishes. Alternatively, we get dishes directly in restaurants or from friends. If contemporary issues related to eating meat emerge from increasing separation of consumption and production, it takes place within these concrete contexts. We buy ham from a certain kind of retailer, where provisions come from a complex chain of piglet breeders, pig farmers, transporters, abattoirs, and processors, where processes may involve advanced technologies and expertise, monitored and controlled by extensive internal programmes and public inspectors, and all of this may be subject to more or less public scrutiny and social mobilization. Taken together, such 'systems' or networks may range from the very small, local and fragmented, via nationally structured and protected, monolithic systems, to globalized, integrated and highly competitive supply chains (for example, see Roex and Miele, 2005; Kjærnes et al., 2007).

Buying particular welfare-friendly food items rather than conventional ones presumes a market that differentiates on these aspects. Choices must be available and there must be relevant information about these choices. And the alternatives must be acceptable in terms of price, safety, quality, etc. That is not always the case. We also see claims for improved farm animal welfare framed as a matter of consumer action and a source of innovation in the treatment of farm animals. It is therefore relevant to look at to what degree animal welfare is associated with purchases.

Figure 3.4 compares the question on general interest in issues of animal welfare to a question referring explicitly to purchases. While a majority say that they do think of animal welfare in general, fewer do so while shopping for food. This is not very surprising. Shopping is only one, very specific arena, the relevance of which depends on a number of things, including the degrees of market differentiation with reference to animal welfare. We must also remember that not everybody shop for food regularly, especially due to a significant gender division of labour with food. So, for quite a few respondents the question is not very relevant. Still, proportions are quite high – and much higher than market shares for animal-friendly products indicate (Roex and Miele, 2005). Moreover, national variations do not reflect variations in availability. A likely interpretation is that good treatment is associated with wider issues, such as organic production, extensive sheep farming, or high quality food from a particular country or region. As a consequence, what people claim to do as 'conscientious' customers does not in any way reflect the supply of specific 'animal friendly' products as reflected on labels. We might characterize this as a lack of 'compliance' or 'consistency between attitudes and actions' and over-optimism regarding own efforts. However, if purchases are instead seen as socially and normatively framed habits, the wider, embedded framing of animal welfare as reflected in the selection of products and the conceptualization of animal welfare in marketing and labelling must be considered.

So, we have public controversy as well as an emerging market focus on animal welfare, discursively reminding people of the 'animality' of meat. We also see that many people across Europe take some kind of action, introducing a degree of conditionality into their food consumption with reference to the treatment of animals. But there is still a question of whether this implies an opening-up of tensions and ethical dilemmas involved in eating meat. Vegetarianism may be seen as one indicator of such tensions, rejecting meat as food. Vegetarianism as a phenomenon is complex, including those who stay away from all food of animal origin or all meat as well as those declining to eat certain kinds of meat or eat meat only on some occasions. One way of operationalizing the question is to ask more concretely to what degree meat is included in the diet. We asked a series of questions on the frequency of eating various kinds of meats. By combining these questions, we could find the proportions of those who were eating the selected meat items monthly or more seldom. From that kind of question, the UK figures are highest, with around 8 per cent rarely eating meat, while in most other European countries the proportion is lower, around 2–5 per cent (Lavik 2006).

These figures are still rather crude proxies for people's responses to opening up and questioning the process of turning animals into edible food. There may be many reasons for not eating meat, some interlinked and some distinct. Issues such as taste, well-being and concern for the animal may be closely connected (Holm and Møhl, 1994; Kjærnes and Guzman, 1998). Moreover, there are practical as well as social difficulties involved in declining from the dominant norm of eating meat. People may be highly sceptical, worried and uncertain and still eat meat (Lavik and Kjørstad, 2005). Attitudes may give some indication of dilemmas involved and the legitimacy of meat eating.

We asked a series of questions on attitudes towards killing animals for food, eating meat and the associations that they make between animal's well-being and meat eating. First, Table 4.1 shows that, when asked directly, a large majority in all countries strongly agrees that it is acceptable to kill farm animals for food, most clearly so in Norway and least in the Netherlands. One third of the Dutch respondents have some or large problems with that. The figures are lower when asking about hunting for food. While even this is highly acceptable in Scandinavia, many disagree in the other countries. We must here take into consideration that while hunting is a common activity in Norway and Sweden, it is much more rare and sometimes controversial (for many reasons) in the other countries.

TABLE 4.1 Eating meat and live animals – proportions that strongly agree on a five point scale.

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden
Kill for food	80	70	73	73	69	87	82
Hunt for food	36	21	44	40	29	84	80
Animals feel pain like humans	81	56	56	64	73	50	65
Wrong to eat animals not having had a good life	54	65	62	55	49	37	54
Improved taste	65	68	45	48	38	46	42
Human health	69	72	51	59	41	38	48
Don't like to think of meat coming from live animals	50	34	21	31	37	17	9
Unappealing to handle raw meat	16	26	23	28	22	10	15

We also asked a couple of questions referring to eating meat, an underlying question being the issue of de-animation. Minor, but still significant, proportions do not like to think of meat coming from live animals. More respondents agree with the statement in Hungary, while very few do so in Sweden. Problems can also be expressed as uneasiness. This is not the dominant feature among our respondents, but there are still quite a few who find it unappealing to handle raw meat, the highest proportions appearing in the UK and Italy, the lowest in Norway. These proportions are significantly higher than the number of vegetarians and must then imply other ways of dealing with the dilemma, such as having somebody else to do the cooking or preferring highly processes items and dishes.

Even though the proportions feeling uncomfortable about associating animals and food should be recognized, the majority still finds that unproblematic, at least when explored in a public opinion survey. The transformation of live animals into food, on the one hand, and concerns related to the treatment of these animals, on the other, seem to raise different kinds of normative questions. Both may affect the edibility of meat. The former seems to be, first of all, a matter of principles, especially about the acceptability or legitimacy of killing animals for food. We find that some people are concerned about this, but it is not a dominant feature. The latter appears to introduce an element of conditionality related to how the animal has been treated and the relationship between humans and the live animals. Quite a few people across Europe welcome a food market that offers meat from 'animal friendly' production. The meat becomes more acceptable or valuable as food if the animals have been treated well. This conditionality may reflect changing human-animal relations, but without necessarily challenging the edibility of meat.

As an indication of acknowledging farm animals as live, sentient beings, a majority across Europe do think that animals feel pain like humans, with the strongest agreement in Hungary and the Netherlands, less in Norway, France and Italy. As an even stronger recognition of the status of animals in food production as live beings, there are also many who agree that it is wrong to eat animals not having had a good life. The question makes an explicit connection between live animals and food. Overall more than half of the respondents strongly agree with such a statement, most clearly so in Italy, with more people disagreeing in Norway. Norwegians are highly concerned with animal welfare, but, especially compared to Italy and Hungary, they seem less willing to make explicit connections between live animals and food. These findings seem to reflect what we suggested above, that the legitimacy of meat eating and animal welfare represent two different dimensions that may or may not be interlinked. Perhaps these variations are indications of the different ways of associating animals and food, as suggested by Vialle (1987), with clear distinctions of animality and humanity in southern countries and a distinction based on de-animation, hiding the animality being more dominant in the north of Europe. In that case, an 'opening-up' may have more dramatic consequences in the north, as suggested by more people declining to eat meat in the UK. The Norwegian case will in this perspective represent a case where a process of opening up has not (yet?) started.

Another reason for the observed variations may be different ways of framing animal welfare. As already suggested, animal welfare may emerge as part of a wider notion of 'good food', instead of being treated as a separate issue. As a parallel to or reflection of this, we asked a series of questions about human and animal benefits of good treatment. Our findings indicate that people see no opposition between the two aspects generally. Many see significant human benefits in terms of taste and human health. There is, however, a tendency that respondents in the North European give less emphasis to human benefits, compared to concern for the animals as such. If we look at human versus animal benefits, we see that only in Italy are the proportions emphasizing human benefits higher than animal benefits, Hungarians are very enthusiastic about both.

4.6 CONCLUDING REMARKS

These preliminary analyses indicate some common features in public opinions about farm animal welfare across Europe. But there are also noticeable national differences. These similarities and differences will be explored further in later analyses, where other survey questions as well as data from other parts of the Welfare Quality project will be deployed.

Farm animal welfare is clearly an important issue for ordinary people across Europe. In that respect, a process of opening up seems to take place. Our findings confirm earlier studies in that respect. But emphasis and worry is not the same. A majority is actually quite optimistic regarding recent trends. Worries are unevenly distributed across the seven countries, together with varying proportions that are unable to assess the situation and say they don't know. National contexts may influence people's specific experiences, general evaluations of performance, as well as media attention. But worries (and saying they don't know) may also reflect an underlying uncertainty and scepticism towards the handling of farm animals in contemporary food provisioning systems.

Even though to a more limited extent, many Europeans also think about animal friendliness when shopping for food. Even here, earlier studies are confirmed. Variations in the association between concern and involvement as consumers indicate that taking on responsibilities does not necessarily depend on individuals' interests and their ethical considerations. The distribution of responsibilities between consumers, the various market actors and the state, can be very variable from one country to the next. Taking on responsibility as a consumer must be associated with the opportunities to act that they find in the food market available to them in their everyday routines. We see here that availability (and price) can be a considerable problem in several, but not all of, the seven countries. But this can clearly not be reduced to practicalities. It refers also to the more politically and normatively framed issue of who should take on the responsibility for animal welfare.

Moreover, making responsible purchases will depend on what people mean by animal friendliness. The emphasis given to animal friendliness when shopping for eggs and beef are much higher than the market shares for labelled products. It is probable that people's understanding of animal friendly food items is much wider than referring to items that are labelled as particularly animal friendly. Even though Scandinavians are as enthusiastic about animal welfare as in the rest of Europe, they seem to be a bit more sober about the benefits. Perhaps the Norwegians, not being very worried about welfare conditions and not much involved through their daily practices, see good treatment of animals as a self-evident part of routine procedure, thus indicating that processes of opening up are less significant than in the other countries included here. At the same time, undifferentiated interest and enthusiasm, as is indicated in Hungary and Italy, to some degree even France, might point in the same direction. Different conceptualizations of food and food production may explain why these countries end up at opposite parts of the scale in this study. While a 'southern' conceptualization of food quality is encompassing a wide range of issues and 'good causes', a more instrumental, disaggregate interpretation of food issues dominates in Norway, where aspects such as nutrition, taste, safety, social and political issues, and so on are all treated as separate. Introducing a new aspect will then also imply a demand for justification, a discussion of division of responsibility, etc. From the figures presented in this Chpater, responses from the UK and the Netherlands, partly also France, come out in between these positions.

Finally, in this Chapter we have also tried to explore whether a process of opening up implies more focus on the legitimacy of killing animals and ethical dilemmas involved in eating meat There may be some tendencies that people are rather worried about the treatment of animals and they also have more problems with the legitimacy of killing and eating meat, thus suggesting that a process of opening up seems to refer to the emergence of animal welfare as a social issue as well as in a personal questioning of meat eating. But these patterns are not very evident and other kinds of information are needed to confirm such assumptions. To most people across the countries under study, animal welfare seems to be a legitimate societal issue without raising any deeper moral concerns about food made from animals.

5

HIGH INFORMATION DEMANDS ON FARM ANIMAL WELFARE: FORETELLING CONSUMER ENGAGEMENT?*

Information seems to be important for people who want to take action as consumers, often linked to general (critical) consumer activism. This activism is somewhat more prevalent in Northern Europe. But for most people, and especially in Southern Europe, information de-mands seem to be more an expression of support to a 'good cause', with no direct association to their own shopping practices. Not wishing more information often indicates a lack of interest in animal welfare issues. But, importantly, we find low demands also in settings where shopping for welfare-friendly foods is most common. An interpretation of this finding is that this shopping has become routinized, taken for granted, with less needs for more information.

5.1 INTRODUCTION

This chapter will analyse farm animal welfare as a matter of public and consumer concerns, as judged from people's demand for information on such issues. In doing so, it will address the growing debate on people's responsibility for and involvement in ethical issues, challenging the widespread view that this is first of all a matter of consumer choice. Instead, it will argue that targeted purchases represent one among several ways of being involved, depending strongly on the institutional and social context. Moreover, animal-friendly purchases may take place without being preceded by particular intentions (or information demands), but rather be part of relatively disengaged, taken for granted everyday routines.

* Earlier versions have been presented at the EURSAFE Conference, Oslo, June, 2005 and at the ESA Sociology of Consumption workshop, Durham, 30 August-1 September, 2006.

Farm animal welfare is an emerging issue on the public and increasingly also political agenda in Europe. Attention is directed towards unacceptable ways of handling animals in modern agriculture (Roex and Miele, 2005). Public concerns have been expressed via mobilization through animal protectionist and animal rights' organizations, pushing for stricter regulations. Increasingly, however, animal welfare has become an issue in the food market, subject to differentiating labelling programmes introduced by producers and retailers, as a separate issue or as an aspect of food quality (Ind and Ind, 2003; Roe and Marsden, 2007). Also, people (or at least some) express their concerns and activism via their role as purchasers of food (Blokhuis et al., 2003). Just as important, other actors often frame people's involvement and responsibilities as a matter of consumer choice in the market (Hughes, 1995). Markets and morals thus seem to be combined in ways where people's individual responsibility as buyers emerges at a crucial point. Individual choice is a theoretical model that assumes a demand reflecting particular preference structures and differentiated market supply to matches this demand (Bennett, 1997).

Whether from these marketing purposes or with reference to political/ethical consumerism, product information is called for. This chapter explores demands for information on farm animal welfare, judged from answers from a public opinion survey. People do seem to want more information. But it is not at all clear *why* they want more information or to what degrees and in which ways it is linked to their own purchases. We find highly variable demands across national contexts, which emphasize the need to improve the understanding of the dynamics behind wishes for more information.

Seeking information may be perceived as a first step, an ambition to act by purchasing food items believed to come from animals that had a better life. Information demands may thus indicate that people see the well-being of farm animals in connection with their own role and responsibility as buyers and eaters of food. But, as already indicated, the association between general interest in farm animal welfare and purchases is not straightforward. It could be that wishes for more information emerge from engagement in other arenas, such as public debates, participation in animal welfare organizations, or political decision-making. Alternatively, information demand may reflect an interest per se, a good cause that should be supported (as expressed in a public opinion survey), but without seeing the necessity or means for being involved directly. In this chapter, a broad division is made between information demands with reference to purchases and the consumer role, on the one hand, and to more general interest in farm animal welfare, on the other. We will study the relative importance of these factors.

First, we look at three aspects that may influence involvement of consumers and demands for information: availability and retailing structure, trust in institutional actors, and politicized consumer activism. We must keep in mind that the classifications that people have when making their purchases may be very diverse. Even when people do say that they consider animal welfare while shopping, we cannot in any way expect the same categorizations as the sellers or animal experts. This has earlier been clearly illustrated in studies of what people mean by food quality, nutrition, health (Holm and Kildevang, 1996; Halkier, 1999; Torjusen et al., 2004).

Second, ethical questions related to food and eating are about much more than purchases. In exploring popular opinions about farm animal welfare, we must keep the possibility open that concern and interest may emerge from deeply founded norms and beliefs on human–animal relations and the acceptability of killing of animals for food. Dilemmas may occur that cannot be dealt with by choosing animal-friendly products (for further discussion, see Chapter 4). Moreover, farm animal welfare as a social and political issue may not be associated with food at all and may refer to the domain of live animals only. Therefore, we may see public engagement, and demands for information following from that, where the points of action may refer to a range of other arenas, like welfare activism directly towards producers and mobilization for stricter regulations.

The empirical approach is comparative, using representative public opinion surveys in seven European countries, supplemented with some institutional data on these countries. This will enable an analysis of how this phenomenon varies across different cultural and institutional contexts. We explore the relative significance of different references for variations in information demand across countries and across socio-demographic groups.

In the next section, we will discuss some theoretical directions for analysing demand for information on animal welfare, linked to different approaches to consumption. This is followed by a brief presentation of the data and the analyses. Next, we discuss the point of departure for this chapter, namely the demand for information. We will explore three types of explanations to national variations in information demand. We will do this step-wise, introducing different sets of explanatory variables. The results reveal some strong common features as well as distinct national patterns. The references for demanding information vary between the countries and, in the final section, we will use this as a basis for examining possible explanations to why demands for information vary so much across the countries.

5.2 CONCEPTUALIZING CONSUMER DEMAND FOR INFORMATION ON ANIMAL WELFARE

In order to conceptualize links between demands for information and purchases, we need to take a closer look at theoretical approaches to consumption phenomena. A dominant notion sees ‘the consumer’ as an individual who chooses freely in a market situation that s/he most prefers. Derived from neo-classical economics, the consumer is seen as a rational chooser, driven by an individual utilitarian orientation, seeking to maximize personal benefits at the lowest possible cost. Through their demand sovereign consumers will have the power to withdraw custom and to pursue novelty. The system of production is seen as responding as a servant to the needs and wishes of consumers (Friedman and Friedman, 1981; Fine and Leopold, 1993). Analysed as a ‘product attribute’, welfare friendliness can be part of this innovative process through consumer preferences and choice. Because markets are (assumed to be) competitive, differentiated foremost by price, consumers' 'willingness to pay' expresses how people value animal welfare compared to other benefits or attributes (Bennett and Blaney, 2002).

While economic theory takes needs and demand for granted, giving them little attention, psychological and marketing-oriented research has focused much more on preferences, i.e. on how consumer needs and demands are constituted. One widely used model for this kind of study is the 'theory of planned behaviour' (Ajzen and Fishbein 1980; Ajzen 1991), where behaviour (food choice) is seen as the result of behavioural intention. This again is determined by the individuals' attitudes (is it a good choice, is it beneficial, etc.?) and the subjective norm (does the individual perceive any social pressure to make the choice?). It follows from this cognitive framing of choice that reflection precedes practice. And norms and values are a matter of individual priority, not socially structured. Consequently, the rationale is to inform actors – whether public policy-makers or private commercial actors – who seek to alter the choices people make through persuading them to change their intentions.

Individual 'choice' in a differentiated market assumes, on the one hand, motivation and prioritization of welfare friendliness when people make their food purchases, and, on the other hand, a supply that matches this demand. From this viewpoint, demand for information may be seen as indicating interest and motivation as a precondition for action in the market (consumer choice). Provision of information will not only tell about available options, but also influence motivation, thus helping to overcome barriers like a higher price.

But information demands about animal welfare can also be analysed with wider references than individual rational choice. Such demands may also be seen in association with social mobilization, with links to consumption in the form of political consumerism. Basically, political consumerism is about how citizens use their purchasing power to influence corporate actors to act in ways they find ethically or politically acceptable (Micheletti, 2003; Micheletti and Stolle, 2004). Consumers who buy (or boycott) certain products (or express opinions about a specific producer) may act with the aim of systematically influencing the behaviour of producers and retailers regarding the welfare of farm animals. It is still a choice, but this choice is formed through various social processes (as an equivalent to elections). Mobilizing agencies seem to be important when it comes to political consumerism, as it does for other forms of political participation. Instead of being alternatives, collective mobilization and individual activism go together and reinforce each other. Information is crucial in this context, as a basis for making people aware of problems and the need to act and for helping people differentiate when they make their critically motivated purchases.

Political and economic approaches to consumption both assume individual agency in the market. At the same time, there is a growing focus on the limited autonomy of the consumer and the complex interaction between daily practices and systems of provision, as a strong critique of individualistic and rationalistic assumptions of 'consumer choice' (Fine and Leopold, 1993; Fine et al., 1996; Lien, 1997; McMeekin et al., 2002). It is, for example, claimed that sustainable consumption has to be understood as influenced by and in interaction with provisioning systems(Southerton et al., 2004). Chappells and Shove talk about 'the orchestration of demand', suggesting that 'infrastructures can be reconfigured in ways that challenge the dominant mindsets' (2004, p. 141).[26] Accordingly, opinions and practices related to food consumption emerge and must be understood within a particular social and institutional context, rather than as individual psychological constructs and ethical priorities. Shopping for meat for supper is shaped very differently in a system based on local provisioning of fresh meat, sold in small shops and open food markets, compared to buying globally sourced, processed and pre-packaged meat dishes from a large supermarket. Conditions for consumer involvement in animal welfare issues will be highly variable, depending on market characteristics, but also influenced by the social division of responsibility for farm animal welfare between various actors in the food chain, the state, non-governmental agencies, and individual consumers. The standard of farm animal welfare is an integrated part of specific production and provisioning system, and we will find animal welfare issues as subject to strategic moves by various stakeholders. Associations between purchasing and eating food, on the one hand, and the welfare of farm animals, on the other, may, as indicated here, be communicated through the food chain. But associations may also be represented in a number of other ways; indirectly through public regulation, via social mobilization and public discourse, as well as in more basic ways of seeing and handling human–animal relations. All of this will influence people's motivations as well as options to act.

In talking about information, trust in institutional actors needs particular attention. In purchasing food, we have to rely on a wide range of actors to do what they promised to do and that our own expectations and standards are sufficiently considered. Trust in food institutions and institutionalized procedures is therefore crucial in order for us to perform our daily activities as consumers. A certain amount of scepticism and distrust is not necessarily disruptive and may instead serve as constructive feedback and a basis for reforms. Political consumerism may be seen as part of such democratic processes. But widespread distrust (often not without reason) is problematic. In those situations, there is a tendency to build up more particularized, familiarity based relations referring to specific persons and places. The particularity may be reflected even in information demands being direct and detailed, as part of seeking more immediate control by the consumer and the household (Kjærnes et al., 2007). Hence, we can suggest that high and diversified demand for information may be associated with a situation of widespread institutional distrust. Generalized institutional trust will not make information redundant, but it can be more generalized in various regards. In a situation of institutional trust, openness and access to information may probably be more important than actually making extensive use of it at the point of purchase.

It is a long way from cattle on a farm to a meal with hamburgers and mashed potatoes. Generally, people will have no knowledge of, and even less direct experience with, what a pig's life is, with only vague ideas of what is wrong and what can and should be done about it. And some may dislike even thinking about the meat originating from a once live

[26] Chappells and Shove are referring here to studies of water and electricity, but we think the perspective can easily be transferred to the case of food.

animal. This is not only about a lack of transparency in the food chain, but about special rituals and institutions being formed to separate live animals, and especially slaughtering, from the general public (Vialles, 1994). At the same time, it may be difficult, from a 'humanist' point of view, to say you do not care about how animals are treated. There is a tendency for pets to be treated as 'almost-humans' and that may spill over to farm animals too (Franklin, 1999). Such issues of cultural change should not be disregarded. They may influence information demands directly and independently or via the political and/or market processes that we have discussed in this chapter.

5.3 DATA AND ANALYSES

The dependent variable is *demand for information*, a latent variable based on six indicators; it is, in other words, an index, treated as a ratio level variable.

Following from this idea of different types of social processes contributing to demands for information on farm animal welfare, six sets of data have been included.

1. Socio-demographic background variables (gender and age).

Explanations referring to food purchases.

2. Shopping practices (where to shop).
3. Trust in institutional actors (who to trust if an animal welfare scandal occurs).
4. Consumer activism (whether the consumers have complained or protested against food related issues).

Explanations without direct references to food consumption.

5. Animal related values.
6. The importance of animal welfare.

In the statistical analyses, we compare the distributions of relevant variables across the seven countries, and subject the data to factor analysis and linear OLS regression analysis. The independent variables are indicators of six analytical dimensions, introduced step by step. Finally, the full model is launched. The step-wise analyses are omitted for the sake of clarity, but statistical effects that disappear after introducing a new analytical dimension are discussed explicitly. Countries are the grouping variable, where we compare the results from identical regression models across the seven European countries. The statistical significance tests used are based on the T-statistic, where the critical level is set to $t > 2.57$, in order to avoid type I error. As a consequence, we only accept less than 1 percent probability for wrongly rejecting a true null-hypothesis.

Some of the indexes, including the dependent variable, are constructed as simple additive indexes based on a standardized set of questions. Others are built up from a more heterogeneous set of questions, where the indicators were identified through factor analysis. In the following, each of these will be briefly described before the full regression model is presented. The contribution from each additional set of variables will be discussed in terms of increases in the adjusted R^2.

The indexes and variables with a 5 point scale are all treated as variables on a ratio level, which is the preferable measurement level when using ordinary regression analysis, and where unstandardized coefficients (B) are used. Since we also normalized the dependent variable (varying between 0 and 100), the B-values are interpreted as an average 'per cent score' change for a one-unit change in the independent variable; that is, measuring the effect on the dependent variable, controlling for all the other variables.[27]

5.4 VARIATIONS IN INFORMATION DEMAND

Our starting point is a question about what kinds of information consumers prefer when it comes to animal welfare: Thinking generally again about food from farm animals (such as meat, eggs and dairy), is it very, fairly or not important to include the following information on the label? The options (to be rotated) were as follows (with no priorities and no limitation in the number of answers): a simple welfare assurance mark; a welfare grading system, such as a number of stars; information about where the animals are kept; information about what the animals eat; country of origin; and farm of origin. Figure 5.1 shows the answers given by the respondents in the seven countries. The results indicate that, rather than asking for very particular types of information, a majority is first interested in the country of origin, knowing about the farm of origin being the least popular option. Looking across the countries, priorities in the kinds of information that people want with particular reference to animal welfare are not very clear in terms of a simple mark vs. a grading system, specific information about where the animals are kept, and the type of feeding. Very noticeable, however, is the large national variation in the overall levels of information demand, Italian and French respondents wanting all sorts of information while the Dutch are generally much less interested.

[27] For all indexes and variables, there are some missing because they answered 'don't know', no answers are recorded, and/or they have been filtered out because the question is not relevant. To include as many respondents as possible in the analysis, all of these were included in the main indexes with the value 0. In the regression analysis, all 'missing' respondents were constructed as dummies; those answering the question were given the value 1; and 'don't know', not answered and or not been asked the question were assigned 0. These are not interpretable, they are only included in order not to leave out too many respondents. In the regression analysis, the not-interpretable dummies are marked with grey.

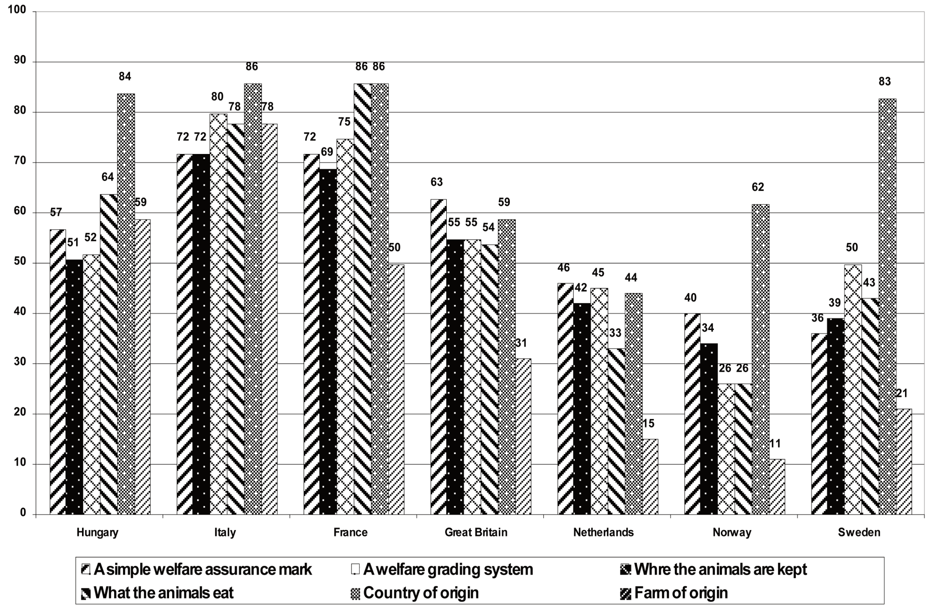

FIGURE 5.1 Proportion 'very important' of the different kinds of information (don't know excluded).

Not all of these demands for information are referring directly to animal welfare. There may be a number of reasons for wanting to know, for example, the country of origin, such as food safety and quality or national chauvinism/idealism. What we find in our data, however, is that the various demands are all strongly correlated. The options were tried in a rotated factor analysis (varimax rotation), which came out with one dimension (factor). The answers reflect foremost the extent to which respondents were interested in product information, here mainly with reference to animal welfare. Based on this, one additive index was constructed.[28] The results are presented in Table 5.1, reflecting what was already observed visually in the chart, namely the varying levels of demand for information. The respondents in Italy and France have the highest scores on demand for animal welfare information. The lowest scores are found among the Dutch and the Norwegians.

5.5 THE EXPLANATORY VARIABLES

The different types of explanations that were presented above are operationalized into six sets of independent, explanatory variables. These sets are not meant as mutually exclusive alternatives in terms of explanations, but we expect them to form different patterns across the national samples. This will allow us to discuss the relative importance of different

[28] The index varied between 0 and 12 (each variable: 0 = not important, 1= fairly important, 2 = very important). Then the index was normalized, varying between 0 and 100. The mean values on the index are then interpreted as a kind of percent score.

TABLE 5.1 Demand for information (additive index).

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden
Labelling index, Mean (0-100)	75	87	84	68	55	52	64
Std.dev	25.15	18.93	16.82	26.08	25.89	25.15	23.56
N	1354	1429	1486	1388	1436	1384	1407

Note: Significant differences between all countries.

factors and explanations across various national and institutional settings. The ordinary regression analysis allows us to identify direct, indirect and spurious effects. The order of the various types of variables is relatively traditional, starting out with socio-demographic background variables, followed by indicators of practices and concrete shopping relations, and ending with indicators of various kinds of attitudes. In the following, we present the operationalizations of the independent variables or dimensions. A major point here is that our question refers to the national (aggregate) level rather than to individual variations. This means that it is important to notice the actual distributions of the included variables across the countries, not just in terms of whether they have a significant impact on individual variations in the dependent variable. It matters for our analysis whether trust is high or low and whether consumer activism is prevalent or not in the various countries.

Starting out with socio-demographic background variables, the character of the household is important in an institutional analysis of food consumption. Many analyses of food consumption issues show that gender and age are those that matter most.[29] In an analysis of comparative differences, it is not only the direct observation of such influences on individual information demands that is of interest, but the possibility of gender roles and age being institutionalized differently across national settings. This is even more obvious for social status, which was not overlooked at the onset of this work. Income was included as an indicator of social status in early versions of the regression model. But with very weak direct and indirect effects and high proportions of missing it was omitted from the final model.

The type of shop may be important for information demand because relevant and available kinds of information are closely associated with the form of distribution.[30] We made a distinction between supermarkets and other types of retailing. While open food markets and butchers sell largely fresh meat over the counter, supermarkets sell much more pre-packaged meat that customers pick from the shelves themselves. A butcher can provide information personally, while supermarket distribution systems will depend much more on written, codified types of information. The type of shop that people use is not merely a matter of personal preferences, but will reflect to a large degree the structure of food provisioning in a particular area and country. Table 5.2 shows very large differences

[29] Gender is a dummy variable, female = 1, male = 0. Age is a ratio variable, varying between 18 and 80 years-of-age.

[30] Butcher/other is a dummy variable, where 1 means that at least one of the four products are bought at a butcher and/or other places. 0 means that all four products are bought at supermarkets (among those who buy groceries). Since not all buy groceries, we have constructed a dummy variable of those who buy (1) and those who don't buy (0), because we want to include as many respondents as possible. This variable does only serve as a controlling variable, and has no own substantial interpretation.

between the countries in the proportion of supermarket shopping. While nearly everybody buys meat from butchers and food markets in Hungary and even the majority in Italy and France, very few do so in Sweden and Norway. These differences imply that the experiences and expectations that people have as shoppers must be highly diverse.

The truth-telling of institutional actors is used as an indicator of trust.[31] We asked a series of questions about the truth-telling of various institutional actors: 'Imagine a scandal concerning the welfare of chickens in your country, do you think that each of the following would tell you the whole truth, only tell you part of the truth, or would give misleading information?'. The results show both differences and similarities (see Table 3.5). The respondents in the various countries have very similar rankings of the various types of actors, but at somewhat differing levels. An exploratory factor analysis (varimax rotation)[32] resulted in three distinct groups of actors: market actors (retailers, farmers, the food processing industry), public authorities (public food authorities, such as the Food Standards Agency, independent food experts), and civil society actors (animal protectionists, press, television, radio). From this, we formed three indexes (Table 5.2). The table shows that public authorities, experts in particular, are highly trusted to tell the truth in the case of a scandal involving animal welfare, while people tend to be much more sceptical towards market actors. Civil society actors rank between these two. The authorities are most highly trusted in the Netherlands, while market actors are most trusted in Sweden. Hungarians are, compared to the other countries, more trusting towards civil society actors. Overall, Italians seem to be the most distrustful, while the Dutch display the highest levels of trust.

A fourth step in our analysis focuses on consumer activism. This is a question about whether the respondents have protested or complained about food related issues: 'Have you done any of the following during the last twelve months (yes or no)? Complained to a retailer (supermarket) about the food they sell; boycotted any food types or brands in protest about food issues; bought particular foods or brands in order to encourage or support their sales, like fair trade (buycotting); protested about food issues either in person, by phone, by letter or e-mail; been a member of a pressure group or organization that works to improve food'.[33] Buying to support is clearly the most common form of food-related activism in all countries (see also Chapter 6). In some countries, this is followed by complaining, in others by boycotting. Least common is being a member of an organization. Activism thus seems to include a wide range of actions, foremost within the market context. Overall, people are most active in France and Norway (boycotting and buycotting), while the least active are found in the Netherlands and Italy (Table 5.2).

So far, we have discussed indicators that are meant to inform about how information demands are linked to the consumer role and to food purchases in particular. The last two sets of variables represent explicitly attitudes towards animal welfare. The first, and thus the fifth step of the regression analysis, includes indicators of animal welfare related to

[31] A similar question, but with reference to food safety, was used in *Eurobarometer* 49 (European Commission, 1998) and in a study of trust (Kjærnes et al., 2007).

[32] Three additive indexes were constructed. The whole truth = 2, only part of the truth = 1, misleading = 0. In order to make it easier to compare, the indexes were normalized to vary between 0 and 100.

[33] An additive index of these five options were computed, and again normalized to vary between 0 and 100.

TABLE 5.2 Univariate distributions of independent variables.

	HU	IT	FR	GB	NL	NO	SE
Shopping Practice							
Proportion shopped at butcher/other	94	68	60	45	53	28	19
N	1214	1127	1263	1210	1168	1247	1243
Trust (Truth Telling)							
Market, Mean index (0–100)	47	36	43	44	46	45	50
Std.dev	20.75	22.91	20.56	22.37	22.05	20.96	20.37
N	1318	1368	1487	1409	1423	1411	1434
Public, Mean index (0–100)	77	66	63	64	80	76	70
Std.dev	22.90	24.77	23.48	27.02	22.89	23.64	23.59
N	1339	1370	1488	1422	1443	1426	1424
Civil, Mean index (0–100)	65	59	60	48	62	62	55
Std.dev	22.69	24.12	22.89	26.27	25.09	27.86	29.30
N	1353	1420	1493	1450	1465	1447	1453
Agency							
Proportion % activism at least one activity (among 5)	59	52	71	62	48	70	67
Mean index (0–100)	19	18	27	23	16	27	25
Std.dev	19.96	22.34	24.25	23.18	19.93	23.51	23.06
N	1451	1473	1495	1473	1477	1473	1485
Attitudes AW							
Human benefit, Mean index (0–100)	88	87	75	79	71	80	78
Std.dev	16.62	16.42	21.02	21.41	19.03	18.45	18.95
N	1380	1313	1487	1365	1385	1410	1357
Deanimation, Mean index (0–100)	33	32	27	33	34	16	16
Std.dev	23.55	26.27	23.59	25.12	23.89	21.12	21.68
N	1411	1415	1490	1405	1469	1433	1465
Availability, Mean index (0–100)	56	52	47	49	45	50	50
Std.dev	22.44	23.07	22.25	23.21	19.58	19.56	20.09
N	1283	1229	1474	1374	1390	1314	1406
Animal orientation, Mean index (0–100)	71	75	68	73	72	65	73
Std.dev	20.73	21.96	23.34	22.11	19.94	21.99	20.85
N	1278	1287	1488	1399	1466	1338	1421
Importance of AW							
When purchasing meat, thinking of AW – Proportion % 4+5 (5=very imp.)	36	54	37	39	27	26	52
Mean (0–100)	49	63	51	52	43	41	62
Std.dev	37.57	37.68	35.25	35.37	33.36	33.22	31.17
N	1249	1173	1337	1330	1248	1364	1334
Thinking of AW in general, how important – Proportion % 4+5 (5=very imp)	83	87	65	73	69	84	83
Mean (0–100)	85	89	73	78	73	84	84
Std.dev	25.16	22.54	31.49	27.05	25.91	22.63	21.70
N	1462	1478	1497	1490	1489	1493	1496

values regarding animals and human–animal relations. Two batteries of questions included altogether 12 statements on benefits and problems related to animal welfare, to handling and eating meat, and to the respondents' own actions. The results show quite varied patterns across the countries. In order to systematize this, we carried out a factor analysis from which three very clear factors can be extracted (Table 5.3). The first factor points to various kinds of *human and societal benefits* (country reputation, increased volume, improved taste and human health). The second seems to refer to ethical dilemmas involved in eating meat (unappealing to handle raw meat, diet restricted by religion, and problems thinking about meat as coming from live animals) – we have called that *de-animation* (see also Chapter 4). The third factor points to practical restrictions of *availability* (difficult to find, too time consuming, not sufficiently informed). The fourth factor refers to *concern for animals* (it is wrong to eat food from animals that have not had a good life, and that farm animals can feel pain like a human being). We constructed additive indexes on the

TABLE 5.3 Attitudes about animals, meat and animal welfare – a factor analysis.

To what extent do you agree or disagree with the following statements, please use a scale of 1-5, where 1 is strongly disagree and 5 is strongly agree?	Human benefit	De-animation	Availability	Animal orientation
To what extent do you agree or disagree with the statement that good animal welfare will improve the taste of the meat?	**0.770**	-0.011	0.035	0.121
To what extent do you agree or disagree with the statement that good animal welfare will increase the volume of milk cows produce?	**0.722**	0.004	0.045	-0.058
To what extent do you agree or disagree with the statement that good animal welfare will improve human health?	**0.721**	0.119	0.061	0.207
To what extent do you agree or disagree with the statement that good animal welfare will benefit the reputation of your country?	**0.696**	-0.057	0.117	0.156
How far do you agree with ... I find it unappealing to handle raw meat?	0.010	**0.715**	0.026	0.048
To what extent do you agree or disagree with the statement that it is acceptable to kill farm animals for food?	0.078	**-0.689**	0.070	0.127
How far do you agree with ... When eating, I don t like to think of meat as coming from live animals?	0.105	**0.645**	0.178	0.132
How far do you agree with I care about animal welfare but cannot find welfare friendly products where I shop for food?	0.139	0.142	**0.707**	0.207
How far do you agree with I care about animal welfare, but it s too time consuming to look for welfare friendly products?	0.074	0.063	**0.694**	0.122
How far do you agree with ... I feel sufficiently informed about farm animal welfare?	-0.005	0.089	**-0.539**	0.386
How far do you agree with ... To improve farm animal welfare, we must be willing to pay a higher price for food?	0.119	-0.031	-0.100	**0.735**
How far do you agree with ... It s wrong to eat food from animals that have not had a good life?	0.247	0.226	0.151	**0.555**
To what extent do you agree or disagree with the statement that farm animals can feel pain like a human being?	0.043	-0.082	0.248	**0.448**
Explained variance (%)	17	12	11	11

basis of these three factors.[34] As shown in Table 5.2, people across the countries are most engaged in human and societal benefits, most strongly so in Hungary and Italy, least in the Netherlands and France. Dilemmas related to eating meat (de-animation) affect fewer, with the largest proportions in Netherlands, the UK and Hungary, clearly fewest in the Scandinavian countries. Problems related to availability are quite common in all countries, but most clearly expressed in Hungary and Italy, less so in the Netherlands and France. Concerns for animals have the highest score in Italy and lowest in Norway.

The sixth and final set of variables focuses on how the respondents assess the importance of animal welfare, in general and with reference to their own shopping practices.[35] Table 5.3 shows that, while large majorities in all countries agree that animal welfare is important, there are also high proportions saying that they think of animal welfare when shopping for food. Italians and Hungarians are generally most enthusiastic, the Dutch and French somewhat less so. When it comes to food purchases, we find the highest

[34] Three additive indexes were computed, thereafter normalized to vary between 0 and 100. The indicator on availability with a minus sign, was reversed when entering the index.

[35] When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come, on a scale of 1–5 where 1 is never and 5 is always? Thinking of farm animal welfare in general, how important is this issue for you on a scale of 1–5, were 1 is not at all important and 5 is very important?

proportions thinking about animal welfare in Italy and Sweden, the lowest in Norway and the Netherlands.

5.6 A MULTIVARIATE ANALYSIS OF VARIATIONS IN INFORMATION DEMAND

In the regression analysis, the index of information demand served as the dependent variable and the explanatory variables presented above were introduced in six consecutive steps. It must be emphasized that even though a regression model technically assumes uni-directional effects of the independent variables upon the dependent variable, there are no such basic assumptions in our interpretations or theoretical discussion. We are studying the statistical strength of associations between questions where influences may go both ways, and this is how we will interpret the results. Also, because we are mainly interested in differing patterns across countries, we must keep the absolute distributions for the various questions in mind (*re* Tables 5.1 and 5.2). Moreover, underlying analyses of bivariate correlations between the variables have been made and will be brought up in order to help in the descriptions and interpretations. The results for the full model are presented in Table 5.4. At the bottom of the table, the adjusted R^2 for the consecutive steps are presented, allowing us to discuss how much each additional set of variables adds to the explanation of variation in information demand. We will first look at the importance of these various types of explanations, and then take a more horizontal look at different national patterns for the full model.

Starting out with the impact of age and gender, we see that gender has a statistically significant effect only in two countries, when controlled for all the other variables. It should be noticed that correlation analyses show that women have a significantly higher demand for information in all the countries, but this is an effect that is indirect, partly as a result of differing practices (food purchases), but foremost because women are more motivated and interested in animal welfare issues. On the other hand, age has an effect independent of other variables. Older people are generally more interested in information than younger people. Taken together, however, apart from the UK and Sweden, these two variables are not very helpful in explaining variations in information demand.

The second step was to introduce the place of shopping. People purchasing meat from butchers or in food markets have a significantly higher demand for information on animal welfare than those usually shopping in supermarkets in France and Hungary, but not in the other countries. We must remember here the very large variation in retailing structures and shopping patterns, where very few Hungarians buy meat in supermarkets, while this is more diverse in France. We find bivariate correlations between type of shop and information demand in all countries but Norway (where there are hardly any alternatives to supermarket shopping) and the findings cannot be taken as an indication that type of

TABLE 5.4 Regression analyses: dependent variable info important index (ordinary regression analyses, unstandardized coefficients).

	HU		IT		FR		UK		NL		NO		SE	
Step 1	B	T	B	T	B	T	B	T	B	T	B	T	B	T
(Const)	38.7	6.76	66.9	13.01	93.7	7.74	49.7	6.95	36.0	3.95	51.7	7.18	48.7	5.71
Female	0.9	0.76	-1.4	-1.38	-1.2	-1.45	**3.8**	3.02	-1.2	-0.96	1.2	1.01	**4.9**	4.33
Age	0.1	1.49	**0.1**	2.96	**0.1**	4.62	0.2	4.49	**0.2**	4.38	0.1	2.13	0.0	0.12
Step 2														
Butcher	**7.9**	2.71	-0.2	-0.19	**5.0**	5.76	2.3	1.73	2.8	2.06	1.4	1.01	-0.9	-0.57
ButchDK	-9.4	-2.92	-3.7	-2.47	-5.1	-4.12	-2.5	-1.48	-2.5	-1.53	-1.9	-1.18	-0.8	-0.49
Step 3														
Market	-0.1	-2.33	0.0	-0.76	0.0	1.87	0.0	0.05	0.0	0.23	-0.1	-2.06	**-0.1**	-3.60
Public	-0.1	-1.79	0.0	0.85	0.0	-1.68	**-0.1**	-2.71	0.0	-1.59	0.0	-0.86	0.0	0.38
Civil	**0.1**	3.26	0.0	0.03	0.0	2.42	**0.1**	3.33	0.0	0.77	0.1	2.83	0.0	1.86
MarkDK	7.7	2.72	2.6	1.17	-9.4	-2.01	3.0	0.93	-2.6	-0.81	8.8	2.54	0.3	0.08
PublicDK	1.8	0.55	-0.3	-0.13	-4.1	-0.90	1.9	0.53	-1.3	-0.33	-0.5	-0.13	1.5	0.46
CivilDK	-5.1	-1.59	1.5	0.53	-10.9	-1.79	2.0	0.50	-6.4	-1.35	-2.7	-0.67	-1.6	-0.42
Step 4														
Activism	**0.1**	2.74	0.1	2.43	0.04	2.82	**0.1**	5.22	**0.2**	5.23	**0.1**	4.33	**0.1**	3.75
ActiviDK	-1.4	-0.38	-4.6	-1.25	-5.3	-0.71	-14.0	-3.03	3.1	0.65	-20.0	-3.71	-7.1	-1.17
Step 5														
Human benefit	**0.2**	5.79	**0.2**	6.38	**0.1**	4.95	**0.2**	6.37	**0.2**	6.40	**0.2**	5.84	**0.1**	4.41
Deanimat.	0.0	1.52	0.0	1.87	**0.1**	3.94	**0.1**	2.69	**0.1**	5.61	0.1	2.36	**0.1**	4.01
Availab.	**0.2**	5.86	0.0	0.79	0.0	0.91	0.1	2.03	0.0	1.06	0.0	1.19	**0.1**	3.21
Animal or	**0.2**	5.25	**0.1**	3.50	**0.1**	3.30	**0.1**	4.15	**0.2**	5.62	**0.2**	5.60	**0.2**	6.29
Human benDK	-11.4	-2.60	-18.0	-5.47	-2.3	-0.47	-13.4	-3.93	-15.7	-4.51	-17.3	-4.39	-10.7	-3.31
DeanimDK	0.0	0.00	-0.1	-0.06	1.2	0.19	-8.6	-3.02	-13.0	-2.88	-13.9	-4.28	-3.0	-0.71
AvailDK	-11.4	-4.28	-0.6	-0.32	-1.6	-0.43	-5.6	-2.01	6.1	2.18	-1.3	-0.51	-6.6	-2.32
Animalor DK	-7.4	-2.39	-4.6	-1.90	-7.3	-1.46	-5.8	-1.67	-7.6	-1.54	-7.9	-2.68	-13.4	-3.91
Step 6														
ShopAW	**0.1**	3.30	**0.1**	5.74	**0.1**	5.12	**0.1**	5.65	**0.1**	4.79	**0.2**	8.85	**0.1**	5.45
AWgeneral	**0.2**	7.88	**0.1**	5.90	**0.1**	6.66	**0.1**	5.91	**0.1**	5.98	**0.1**	5.28	**0.2**	7.15
Summary Model		R^2		R^2		R^2		R^2		R^2		R^2		R^2
1		0.01		0.02		0.04		0.08		0.05		0.05		0.07
2		0.02		0.02		0.07		0.09		0.06		0.05		0.07
3		0.04		0.01		0.08		0.11		0.07		0.08		0.09
4		0.05		0.02		0.10		0.16		0.13		0.11		0.12
5		0.20		0.11		0.17		0.8		0.26		0.24		0.25
6		0.24		0.17		0.23		0.33		0.30		0.31		0.30
N	1354		1429		1486		1388		1436		1384		1407	

Note: With relatively large samples in all countries, we have chosen a significant level of $p < .01$ (T-value higher than 2.57), i.e. less than 1% probability of a type I-error. The significant effects on the B-values of $p < .01$ are highlighted with bolds. However, the variables constructed as extension DK (don't know) variables are not given any notice even if they are significant. For the sake of clarity only the last full model is shown. However, the explained variance is showed for each step. (Levels of significance : T-value higher than 1.96, $p < 0.05$; T-value higher than 2.57, $p < .01$; T-value higher than 3.29, $p < .001$).

shop does not matter. Within the model, the R^2s indicate that the contribution is biggest in France.

The third step was to introduce the three variables on the truth-telling of market actors, authorities and civil society actors, respectively. These indicators of trust are quite closely correlated, but they still present a rather differentiated pattern in our analysis. As can be seen from Table 5.4, there are significant effects when all other variables are controlled for in five of the countries. People who trust that animal welfare/rights NGOs and mass media are telling the truth have a stronger demand for information on animal welfare. It is worthwhile noticing that in the countries with the overall highest and lowest levels of institutional trust – the Netherlands and Italy, respectively – there are no significant effects on information demand. Taken together, these variables add something, but not very much to the overall levels of explanation.

This is different when the activism index is introduced. There are clearly significant effects in all seven countries, and it adds considerably to the overall level of explanation, especially in the UK and the Netherlands. The more active people are as (politicized) consumers, the more interest they have in information on animal welfare. And this is not an indicator of personal motivation regarding animal welfare, because the other variables included should control for that, it is probably a reflection of more or less active consumer roles.

The variables introduced in the fifth step have even stronger effects, in all seven countries. Attitudes towards animals and animal welfare matter considerably. This is particularly the case for the index on human and societal benefits. We saw that a majority in all countries emphasized such benefits, and this analysis indicates that these non-animal related attitudes are very important to explain information demand. The next dimension to follow is de-animation, but it involves a considerably smaller proportion of the respondents in the various countries. Availability also has some effect, but only significantly so in Hungary and Sweden. Animal orientation has a strong positive impact on the degree of information wanted in all countries. The more the welfare of the animals is prioritized, the higher the demand for information.

In the final step, we included the questions about general interest in animal welfare. Even when controlling for this large number of variables that all have some significant effect, these two variables are highly significant and add considerably to the overall levels of explanation. This is particularly the case for the question on general interest (except in Norway). Taken together, we then arrive at high levels of explained variation in information demand, highest in the UK with 33 per cent and lowest in Italy with 17 per cent.

As indicated by this step-wise description, there are many similar findings across the national samples. But there are also important differences. This is most evident when looking at how much the various types of independent variables add to the overall explanation. Socio-demographics and shopping patterns have little impact in Italy and the low levels of institutional trust do not seem to matter there. The main explanation comes from the attitude variables. Patterns are similar for Hungary, but here trust is of some importance. France is a bit different, first of all because the place of shopping matters more. The four North-European countries share a considerably higher overall level of explained variation. The main reason is that socio-demographics, trust and activism are generally more important for information demand, in the UK and the Netherlands even the place of shopping.

Taken together, we arrive at a rather surprising conclusion, where information demand is first of all a reflection of general interest in animal welfare. But when looking across the countries the findings are also quite polarized regarding the impact of other conditions than this general interest, conditions that we regard as having some kind of reference to purchasing practices beyond expressions of motivation. This forms the point of departure for our discussion of the findings in relation to the initial theoretical questions.

5.7 INFORMATION DEMANDS AND CONCEPTUALIZATIONS OF THE CONSUMER

The contextualization of the consumer role open up the possibility that different processes may be relevant in different social and institutional settings. If demand for information is first of all associated with purchases, we might assume that the demand would be associated with persons for whom those decisions are most relevant and with situations in which they are made. It is difficult to find support for that in our analyses. First, the gender division of labour generally has large impacts in studies of food consumption. This division is considerably stronger in Latin countries than in Northern Europe (for example, see Kjærnes et al., 2005). However, even if we find gender effects in our analysis, they are stronger in the north, and in the south they disappear when the attitude questions, rather than the practice questions, are introduced. So, when women have stronger information demands, it is first of all because they are more interested in animal welfare, not because they carry out more of the food purchases.

Second, the products offered in supermarkets are generally different from those offered by butchers and in open food markets, providing a much wider range of pre-packed alternatives. Information demand is associated positively with whether the respondents think of animal welfare when shopping. But invariably, it is those usually shopping in other places than supermarkets who ask for more information – on everything. Shopping in supermarkets, where labelling and other written information are more relevant, does not induce similar high demands for information on animal welfare. This is important for our comparative analysis because the market structures are so different across the countries. And the answers linking animal welfare to shopping are hardly reflecting purchasing patterns for products particularly labelled as animal friendly. There are relatively high proportions of Italians, Hungarians and Norwegians who report that they frequently buy animal friendly meat (European Commission, 2005; see also Chapter 3 of this report). But this must express a generally positive attitude or (quite likely) quite different ways of understanding what animal friendliness is. Market audits of relevant labels in these countries indicate a very limited availability (Roe and Marsden, 2007). The supply that might support such high figures is simply not there. We end up with a rather paradoxical situation, where the Dutch, with a relatively developed market for animal-friendly products, are comparatively the least motivated and also the least interested in information of any kind. In Italy, where supply is much more limited, where shopping in other places than supermarkets is widespread, and where the consumer role and consumption practices do not seem to influence information demands at all, people are most motivated and have the strongest demands.

We have suggested that demand for information about animal welfare may be associated with political consumerism as a form of social and political mobilization. Farm animal welfare might express growing ethical concerns about modern forms of food production and marketing. This form of 'individualized collective action' (Micheletti, 2003) has often focused on demands for information, especially labelling, as a precondition for active choices and thus for making their voice heard in the market. We find in this study that people are quite active when it comes to food issues, more so than what was found in a study from 2002 (Kjærnes et al., 2007). It may be that this form of activism is growing rapidly. It could also be that animal welfare is such a good cause, increasing peoples' enthusiasm during the interview (which we also see for several of the other questions). In any case, we do find that the activism index is positively correlated with information demand in all countries. This is not necessarily a very critical position, as positively supporting the sale of certain products is contributing significantly to the overall figures.

So, our analyses do give some support to information demands being associated with phenomena that have been characterized as political consumerism, indicating a consumer role that is active and politicized rather than loyal, individualized and private. However, the question remains how this can contribute to explain the observed country differences in information demand. Activism as described here does not vary in any systematic way between countries with high vs. low information demands. What is noticeable instead is that activism adds much more to the explanation of variations in information demand in the Northern countries than in Hungary and Italy, France occupying a middle position. This might be taken as an indication that demand for information on animal welfare is linked, at least to some degree, to political consumerism as a societal phenomenon and as a politicized consumer role in Northern Europe. However, the high demand for information in Italy and Hungary must be explained in other ways.

An earlier comparative study of trust in food, focusing mainly on food safety (and quality), found large national variations in trust in institutional actors. Trust had some impact on what people do as food consumers, not in terms of personal choice but expressed as aggregate level interrelations (Kjærnes et al., 2005; Kjærnes, 2007). In that study, trust in market actors and authorities – that is the actors having the most direct influence on what you buy – appeared to be most crucial. Our survey included a similar question to that earlier used about the truth-telling of institutional actors, but this time referring to animal welfare (instead of food safety).

In the regression model, trust does have some impact on information demands, but more so in the high-trust countries and, foremost, positively associated with trust in civil society actors. One interpretation is that trust is important to explain information demand, but that this is mainly expressed in terms of aggregate country differences rather than as a differentiating factor between individuals. However, country differences in the impact of trust may open for an alternative interpretation. If we focus first on Italy, we see that none of the practice or consumer-related questions adds anything to the explanation of information demand, only general attitudes. This is contrasted to, for example the UK, where each step clearly contributes. These observations may lead to a very different type of explanation, namely that while information demand is to some degree associated with what people do as food consumers in Northern Europe (and the UK in particular), this is not the case in Italy. Information demand in Italy appears to represent an opinion, a general interest instead of indicating a practical tool emerging from consumption practices. Within this context, it is understandable that problems of trust do not have an impact in Italy. Trust in food is foremost embedded in or a characteristic of interrelations between consumers, market actors and authorities. These interrelations are of less relevance when information demands do not emerge from daily consumption practices. Trust is relatively low in France as well, and here it does have some impact, as do shopping patterns. Although only weakly, the patterns for France may suggest that here demand for information is more strongly linked to consumption – and then distrust matters (a bit) more.

Yet, none of these analytical perspectives seem to capture the major contributions to the explanation of information demand, namely the general attitudes and motivational questions (we have already argued that even the question on the importance of animal welfare while shopping should at least partly be categorized as such). While the significance of consumption practices and the consumer role seems to be important to explain country differences, these general questions are most influential in all countries, even in a regression model where their effects are controlled for all the other types of variables. The non-consumption character of these effects is emphasized when considering these sets of questions more closely. If we look at the three types of attitude questions, the references to societal and human benefits clearly matter most, followed by personal ethical issues. Availability only has significant effects in Hungary and Sweden. So when the respondents say that they want information about animal welfare and other issues, like country of origin, they seem to do so primarily because of general interest and positive attitudes, rather than with reference to market action.

5.8 FINAL COMMENTS

The aim of this study is to learn more about consumers' expectations towards and involvement in the improvement of farm animal welfare. The idea behind using a comparative method is that systematic national comparisons can reveal basically different normative and institutional ways of and conditions for handling farm animal welfare. Decisive conditions are often taken for granted, such as the social division of responsibility, and can be identified more easily in a comparative study. It is obvious that a telephone survey gives rather limited possibilities for identifying such conditions. This is also why the project includes a number of other types of data and methodologies. What we see by analysing the survey data is that people in the various countries – as consumers and as citizens – respond in ways that for some questions are quite similar, for others highly diverse. These variations seem to be paralleled by differences at the levels of primary production, processing and distribution, as well as in governance structures and public discourse (for a first overview, see Miele and Roex, 2005; Kjærnes et al., 2007). Still, the survey data do give rise to some indications of the dynamics behind variations in information demand, which, in turn, are linked to the more general question about consumers and animal welfare.

First, people across Europe invariably display very positive attitudes towards the improvement of farm animal welfare. This is also found in earlier studies (European Commission, 2005). What is meant by good animal welfare may vary considerably, an issue that will be explored in other parts of the WQ project. The general interest is reflected in demand for information. These demands are, however, quite non-differentiated and highly variable across the countries.

Second, analysing motivation, information demands and practices framed as individual consumer choice is of little help, partly because the associations between opinions and practices are so poor (and clearly not uni-directional), partly because the impacts of institutional, structural contexts expressed in country differences are strong. There is no 'standard' consumer or isolated model of 'consumer choice'. We suggest instead that the consumer role should be analysed as a social and relational phenomenon embedded in and framed by institutional conditions and normative expectations.

Third, political consumerism or consumer activism seems to be important for information demands in Northern Europe, much less so in the South. These observations point to particular consumer roles and forms of consumer involvement, referring to a range of social, political and personal issues. Our analyses suggest that engaging in animal welfare does not seem to be mainly an outcome of personally being more 'ethical', but more a matter of how an issue like animal welfare is framed socially and politically and how this is linked to consumption, discursively and institutionally. This will be followed up with more analyses in Chapter 6.

Fourth, trust is important for interrelations between food consumers and other actors in the food system. Different kinds of interrelations – for example, whether they are personal or impersonal (butcher vs. big supermarket) – matter for the forms of and conditions for trust. However, the impact of trust is not very large as long as engagement in animal welfare is not strongly linked to daily consumption practices.

Finally, public opinion about farm animal welfare remains largely just that, a matter of opinion, a good cause that most people find easy to agree with. Information demands generally reflect this positive attitude. There may be a number of explanations to that. The societal distribution of responsibility for farm animal welfare may direct attention towards very different arenas, such as regulation by the state. Market differentiation based on varying levels of animal welfare is limited in several of the countries, sometimes also opposed. We see that many people are interested, but we also know that interest does not necessarily imply that people are worried about the conditions in their own country (*re* Chapter 3). And if they are, they may judge other forms of action more efficient – or see their own voice as a consumer as having little influence. Later analyses will allow us to go deeper into such questions.

Does this mean that animal welfare is irrelevant as a consumer issue? Or that animal welfare concerns can only become part of food consumption practices when representing explicit activism? To us, that would be very wrong conclusions. Consumption and conditions for consumption may certainly become subject to turbulence and activism. This has happened throughout the history of marketed food and for many issues. Information, perhaps quite detailed, may in that respect represent an important condition for involvement and mobilization as well as signifying openness around production standards. Still, food consumption is generally highly routinized, embedded in tacit, taken-for-granted norms and expectations and organiszational structures. These norms may shift, and in some countries there are signs of welfare friendliness becoming part of that. The Netherlands has the highest proportions of marketed welfare-friendly products for eggs, including all eggs sold in supermarkets. When the Dutch seem to have so little interest in more information, one reason may be that, at least for a proportion of the Dutch (and the British), animal welfare has become institutionalized as part of routine food purchases. Habitual purchases are rarely associated with complex information needs, and (if any at all) may be limited to only very broad and simple symbols, such as brands, country of origin or a supermarket chain.

6

FARM ANIMAL WELFARE: AN ISSUE FOR CONSUMER ACTIVISM?

6.1 INTRODUCTION

Citizens can use the market as an arena for politics in several ways: by refusing to buy products they find harmful to themselves or others, by deliberately choosing specific products to support the principles under which they have been produced, or to protect themselves or others from harm (Micheletti, 2003). This may take the form of preferring or avoiding some products – for example, those that are labelled as animal friendly, rather than others. The response may also be more drastic, by declining to purchase and eat certain product categories, such as meat or even all products of animal origin. As demonstrated in previous chapters, the Welfare Quality survey has shown that a majority among the people investigated is concerned about the welfare of farm animals. In this chapter we will explore to what extent such concerns take the shape of individualized responsibility-taking through consumer activism.

In recent years, a number of contributions have focused on observed tendencies of new issues being considered within the context of consumption, issues that go beyond those affecting own household. *Taking Responsibility* is the title of the proceedings from a recent international conference organized by 'The Consumer Citizenship Network' (Tangen and Thoresen, 2005). Here, consumer mobilization and politics is not only about rights, but also about responsibility, shared responsibility. The conference stated that people wish to – and should – take responsibility for a range of social issues in their role and capacity as consumers. Consumption represents a special aspect or form of citizenship, attributed with explicit rights and responsibilities. This seems to represent a widening and generalization of issues that have been raised for some time under the headings of 'political' or 'ethical' consumerism. In this perspective, the market is not only an arena where problems and conflicts are generated but also a place for problem solving via his/her purchases (Gabriel and Lang, 1995; Micheletti et al., 2003; Harrison et al., 2005). Whether political, ethical or responsible, these are all indicating a self-confident consumer, a 'chooser' prepared to contribute his or her share in solving social problems.

The current focus on farm animal welfare is frequently categorized as 'ethical choices' (for example, see Bennett, 1997; Korthals, 2004; Barnett et al., 2005), often with an ideological (or moral) framing of individual rational choice. A more politicizing approach is taken in studies that focus on 'political consumerism' as a new form of social mobilization, expressed in boycotts and buycotts with reference to people's ethical, political or environmental concerns. Political consumerism has been defined as 'consumers choice of producers and products is based on political and/or ethical considerations' (Stolle et al., 2005). Citizens exercise political consumerism in many ways, including the following: by refusing to buy products they find harmful to themselves and others, by deliberately choosing specific products to support the principles under which they are produced (Micheletti, 2003), and by being vegetarian to protest against the mistreatment of animals. When consumer demands or responsibilities regarding farm animal welfare receive a lot of attention now is that an indication of such processes, that Europeans are becoming more 'ethical' or 'responsible' in their purchasing choices?

The first analyses of the Welfare Quality population survey showed that a great deal of the people in the selected countries worry about the welfare of animals (Kjærnes and Lavik, 2007). In Chapters 3 and 4, we asked how such concerns are related the practices of purchasing and eating food. In this chapter, we explore the relationship between farm animal welfare and food consumption from the perspective of political consumerism. To which degree is concern for animal welfare part of political consumerism of two kinds: choosing or avoiding specific products and declining to eat meat/animal products, respectively? Which form of response is most important? In which social groups and regions of Europe do we find the strongest connections between animal welfare concern and political consumerism? To which degrees is involvement in political consumerism influenced by particular market and retailing structure? The chapter will first discuss theories addressing phenomena characterized as political consumerism. Using data from the survey, the methodology of which is described in Chapter 2, we will first describe the extent of political consumerism related to food in the seven countries. Using these as the two dependent variables, with the use of logistic regression analyses we explore the degrees to which the two forms of activism, respectively, are influenced by country of residence, socio-demographic background factors, consumption practices and contexts, and opinions on animal welfare. We find that while engagement in animal welfare issues is a cause of market-oriented activism in some countries, mainly in Northern Europe, declining to eat meat seems quite unrelated to concerns for animal welfare.

6.2 THE POLITICS OF CONSUMER CHOICE

Political consumerism has been used as a political tool for change throughout our entire modern history. A number of historical studies of consumption have demonstrated that such broader issues with reference to a social and political agenda are far from new, but have instead appeared more or less as part and parcel of the emergence of modern forms of consumption – at least since World War I (Cohen, 2000; Daunton and Hilton, 2000; Theien and Lange, 2004; Gabriel and Lang, 2005; Trentmann, 2006). Consumption as a political issue has been part of many revolutions and social upheavals, and boycotting specifically has been used to gain civil rights by ethnical groups, women and organizations in the civil society (Micheletti, 2003, pp. 55; Tilly and Tilly, 1975; Argenbright, 1993; Tilly, 1994; Rosenberg, 1994; Hilton, 2004).

There are, however, some aspects of contemporary political consumerism that seem new and in need of further investigation and analysis. Political consumerism has been linked with the rise of new forms of mobilization (Melucci 1989, 1996; Beck 1994). A characteristic of this type of mobilization is the emphasis on individual experience and the fact that it tends to arise around the problematic knots of modern life. Different from forms of mobilization related to the classical conflict capital/labour, which implied a strong organization and codified criteria of participation, new movements are instead open and loose, adapting to forms of participations that correspond to the fragmentation of modern life. Micheletti defines this type of mobilization as 'individualized collective action' (Micheletti, 2003), stressing the micro–macro link that characterizes these forms of mobilization. Moreover, contemporary consumer activism introduces new patterns to the traditional forms of political mobilization. As suggested by Follesdal, 'traditionally, political participation has involved the relationship between citizens and their government, which in turn regulate the market. Political consumerism adds to this conception in that citizens turn directly to the market with a variety of political concerns' (2004: 3).

This centrality of the market as an arena for political participation seems to be related to the deep restructuring processes that have characterized most of the wealthy economies in Europe and in Northern America. Commercial products represent the tangible link between the unreachable producer and us – ordinary people in Western countries. As reaching 'Mr NIKE' is impossible, it is through boycotting the products of this corporation that we can give voice to our protest for the use of child labour in mass production.[36] Micheletti defined this phenomenon as political consumerism.

> '[It] represents actions by people who make choices of producers and products with the goal of changing objectionable institutional or market practises. Their choices are based on attitudes and values regarding issue of justice, fairness, or non economic issues that concern personal or family well being, or political assessment of favourable and unfavourable business and government practice. Political consumers are the people who engage in such choice situation. They may act individually or collectively. Their market choice reflects an understanding of material products as embedded in a complex social and normative context' (Micheletti 2003, pp. 2–3).

It is worth noticing that this definition focuses particularly on the 'purchasing dynamics' – the role of consumers as shoppers. At the very core of political consumerism is the idea that conscious citizens, when acting as consumers, will make purchasing choices according to their values and political orientation. This is a type of action that is assumed to replace or add to not only traditional forms of political voice. The emphasis on individual consumer choice also seems to replace more traditional forms of consumer protest, like

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[36] The Nike campaign is well described by Jonah Peretti, The NIKE Sweatshop Email, in Micheletti, Follesdal and Stolle, 2004.

abstaining from buying ('exit') and, further away, riots and looting (Thompson, 1971, 1980; Tilly, 1975, 1988). Studies analysing this phenomenon tend to focus on variables related to political participation, civic engagement, and individual values. Resembling classical liberalistic theories, consumers are perceived as voters that through their purchasing power prize or penalize specific producers or products. While not adhering to the strongly utilitarian, self-interested focus of the consumer of neo-classical economics, the debate on political consumerism still seems to be influenced by underlying assumptions of consumer sovereignty and consumption as a matter of reflective choice at the point of purchase, based on prioritized preferences and information input.

There is a growing literature arguing that instead of representing individual acts of decision-making in the market, consumption should rather be seen as sets of institutionally and normatively embedded social practices. Consumption is not a practice by itself, but represents an element of everyday activities, whereby people 'engage in appropriation and appreciation, whether for utilitarian, expressive or contemplative purposes, of goods, services, performances, information or ambience, whether purchased or not, over which the agent has some degree of discretion' (Warde, 2005). Purchase is one – important – way of appropriating goods and services. The social embeddedness of buying goods refers directly to the interaction associated with purchase and to the meaning that the purchased products have in shaping personal and collective identities. Buying food, for example, is an activity that is strongly habitual and normatively regulated, framed by the expectations and structures of everyday life as well as institutional contexts represented by food provisioning systems, public discourse and state regulation. Rather than assuming that motivations necessarily precede action, action may very well influence the motivations. This is important for understanding consumers as actors, where this socially embedded role as buyers may form the foundation for various forms of voice, mobilization and collective action, as well as influencing the reference to consumers in broader political alignments.

The habitual and taken-for-granted character of everyday consumption as well as the organization of provisioning may help to explain why consumptions practices usually change only slowly and in characteristic ways (Kjærnes et al., 2005). Yet, market dominance can be broken and new types of consumption do actually emerge. Noticeably, many relevant forms of 'alternative' consumption have not emerged from shifting individual preferences or consumer experiences alone. In many cases, changing purchasing patterns have taken place in association with the action of organizations, grass-roots groups and committed people who have contested particular types of production and even the establishment of alternative provision's systems, as the examples of the fair trade and of the organic movement testify (Nicholls and Opal, 2005). Demands for 'animal friendly' food products seem strongly associated with changes in the food market as well as in political attention and mobilization (Kjærnes, 2007; Roe and Marsden, 2007). These initiatives show how civil society may mobilize into the market arena.

Contextualizing political consumerism raises a series of questions from the perspective of consumption. The actual availability of ethical products and how are they are distributed and marketed will influence consumption practices. This refers to market actors' promotion of 'ethical' products. 'Corporate responsibility' and 'ethical' products seem to be central to corporate policies in some countries, on some issues and for some product categories. In other countries and in other situations, such products are absent or even considered with scepticism. Reasons for this may be found in differences in the various national production and distribution systems and their integration with the global economy. What are the opportunities for ethical products to enter the market? How is the distribution system for alternative products organized? The social distribution of responsibility is also crucial. For example, marketing 'animal friendly' food products may be opposed because it implies market differentiation and that some farm animals are treated better than others; general minimum standards enforced by public bodies are seen to be preferable to both consumers and market actors.

Food purchase and meal preparation depend on a number of factors, regarding concern and care (Miller, 1998), appropriateness (Bugge and Døvig, 2000) and specific food cultures and eating patterns (Kjærnes, 2001). The configuration of food consumption is also shaped by the specific context formed by the food provisioning system. The aim of this section is to discuss how the availability of products and the way they are made accessible to consumers have can shape consumer activism. As political consumerism is defined as a matter of making choices in the market, we argue that the opportunities for making those choices should be considered carefully.

We have so far associated political consumerism with a market context, to selective shopping practices between relatively equal items in terms of quality and use. But political consumerism may be much more radical too of course, not only in terms of where and what to shop, but in terms of abstaining from a whole category of food, such as meat or even all products of animal origin. Such responses are generally characterized as 'vegetarianism' and 'veganism', respectively.[37] Vegetarianism as well as a carnivore food culture can be explained by the way we are legitimizing the killing of animals. Theory suggests that this is explained by how we construct and uphold the relation between humans and animals. This is done in different ways in different social context. In religious communities, and perhaps especially historically, the killing of animals is connected with religious rituals and prohibitions of how the killing should be done and what is edible. This makes the killing acceptable since it is done by a representative of and under auspices of God: God is giving approval. In modern western societies, Christianity has influenced the human–animal relation. Killing animals is separated from religion and the animals are being reified – they become objects or 'things' (Roex and Miele, 2005, pp. 19f.). Deriving from this theory, vegetarianism can be explained by a deconstruction of a legitimacy of killing based on distance and compartmentalization of food and eating as distinct from animal rearing and slaughter.

Vegetarianism is being highlighted and described in this study as political consumerism, as a lifestyle political strategy. The study is about animal welfare and consumers who might support political consumerist animal welfare, and we argue that vegetarians are one

[37] These concepts represent relatively broad orientations of ideology and practice, where 'vegetarianism' indicates dietary avoidance of meat and meat products, but including food items such as eggs and dairy products, sometimes even fish. 'Vegans', on the other hand, avoid all dietary items of animal origin, some even other animal products, such as leather for shoes and clothing.

such consumer group. To not buy meat at all can also be an expression of concern for animals' welfare, often a political expression. Different country reports presented in the first report from the Welfare Quality project show that the main motivations for avoiding meat consumption are health, animal rights and other ethical, social and political issues. 'Respect for animal life' and 'health' are especially highlighted as important motivations (Roex and Miele, 2005, pp. 11f.). This means that vegetarianism is *in general* a political phenomenon. Vegetarians are making choices based on political grounds and their actions have, therefore, been described earlier in this study as lifestyle politics. Moreover, in most countries a vegetarian lifestyle implies a radically different pattern of food consumption compared to the other citizens – in France, for example, where the consumption of meat is high, both in terms of the share of carnivores and consumed meat per person.[38] It is also a constant political positioning that constitutes everyday consumption patterns. Therefore, this form of political participation (when it is really political) could be seen as deeply engaged political consumerism and, thus, vegetarians are for this analysis an important consumer category. As mentioned above, vegetarianism tends to fluctuate with perceptions of farm animals' living conditions. It is thus a signal to market actors and perhaps also to the government that animal welfare and rights needs to be looked after and resources for doing this should be distributed.

6.3 THE EMPIRICAL ARGUMENT

The initial questions here are directed towards the level of consumer food-related activism in the selected countries. What is the extent political consumerism (boycott/buycott) and declining to eat meat and how is the relative distribution between these two types of phenomena?

The second group of questions are addressed in a regression analysis, where we consider several types of explanatory factors for variations in these two phenomena. Micro-determinants such as *background variables* and different *values*, and *institutional* and *national-level* factors, will be inserted in the model to enable us to determine which are most important and how they all relate to each other.

First, we will look at variables such as gender, age, income, working situation, education and religion, which earlier studies have shown to be important for political consumerism in general. The results in this section will later be contextualized by previous research.

Second, we want to gauge whether consumers of food also care about and act to promote animal welfare through their consumption? We include *opinions* about animal welfare and

[38] Only 1–2% of the French people are vegetarians (Roex and Miele, 2005, p. 12), and they consume 133.6 kg meat (fish included) per person per year. This can be compared to the UK, where 103.9 kg meat is consumed and 6–7% is estimated to be vegetarians (ibid., pp. 6–12).

their own well-being concerning health and personal economy are all important factors for this study. Values about animal welfare have been divided into two categories: values about the treatment of animals and values about animals' rights to life. The consumers' view on how beneficial animal welfare can be for humans is one such variable. How they experience barriers, especially concerning availability of animal 'friendly' products, and their beliefs about consumers responsibility and possibility to influence via their shopping habits are also highlighted. These actions as indicators can be supplemented with a measurement of how important animal welfare is in general to the political consumers of food. These indicators can also give us information of the depth of engagement.

Third, we investigate if the consumers' *assessment of animals' welfare* situation can have effect on boy/buycott of food and vegetarianism? Most people believe that the animals' situation in their own country has become better or at least not worse (see Chapter 3). But what about those who do believe that the conditions under which animals live in the food industry has become worse? Can this risk assessment be a trigger to take individual responsibility by reconstituting shopping habits? Apart from information, consumers must also rely on societal institutions in which they can act (if they want to) to handle risks. They need to trust these to find it meaningful to act within them. Hence, it is interesting to investigate whether this presumption is applicable in the case with political consumers of food.

Fourth, in addition to the explanatory factors presented above, this study also introduces institutional and national dimensions, *barriers and retailers*. In so doing, we are trying to estimate how dependent political consumers of food are on the institutional and national settings? In other words: how much does it matter which country you live in and in which type of market structure and type of store you buy food, considering your personal context of values, beliefs, motivations and background? By analyzing the effects these variables have on and their explanatory power for boy/buycotting food and vegetarianism, we can draw conclusions answering this question.

Finally, the *countries* are the last step in the regression analyses. The study of political consumerism is criticized sometimes for being to narrowly focused on individual choice and giving too little attention to the choices' contexts (for example, Kjærnes and Lavik, 2006). This study is not trying to see political consumerism from an aggregate level, but it does take into account, however, the interdependent, dialectic relationship between consumer agency and structure, which is in line with the Welfare Quality project's overall perspective (Roex and Miele, 2005, p. 73). This is carried out by estimating the macro and mesa aggregated levels' influence on the individual.

After judging the significance of the variables introduced into the regression model for political consumerism and for vegetarianism, it is important to return to the whole model, partly to discuss the relative importance of the various steps introduced consecutively, partly to compare the results for the two analyses, asking about the directions and the overall usefulness of the model regarding the two dependent variables, political consumerism (boy/buycott) and vegetarianism (non-meat-eating). Do these two types of practices represent similar kinds of consumer activism or are different dynamics involved.

And what are the relative impacts of personal, individual level explanations and institutional level explanations?

6.4 DESCRIBING THE VARIABLES

6.4.1 Boycotting and Buycotting Food Items

As can be seen in Table 6.1, there is considerable consumer activism related to food across the seven countries. The overall most important form of action is to make strategic purchases in order to support a certain producer or brand. Next comes boycott, where the respondents have avoided certain products to protest against some food issue. Also, one in four of the respondents have complained to a retailer or supplier. Fewer people have expressed their voice in other ways, such as sending a petition or writing a newspaper article. Least common is voice in the form of collective action. On average, only 4 per cent have done so. This does reflect, of course, the degrees of effort put into their political actions related to food, where organized activities do require more effort and also gives more visibility. However, it does also tell us about the arenas that are most important, and we can see that market-oriented action is clearly dominant. Table 6.1 shows that these tendencies are found across all countries. But there is also some variation in the relative proportions of consumer action. While complaining is most significant in Norway and boycotting in Sweden, the highest proportions of buycotting are found in France and the UK. Even though other types of action are much less prominent everywhere, the French are clearly most active in protesting, the Dutch in organized action.

In the further exploration of the association between political consumerism and concerns for animal welfare, we will concentrate on boycotting and buycotting. These are the most significant activities and they are also the activities most consistent with the theoretical

Table 6 1 Consumer food activism (% participants, don't know excluded)

Form of action	Hungary	Italy	France	UK	Netherlands	Norway	Sweden	Total
Complaining	23	22	28	27	16	36	29	26
Boycotting	19	23	38	25	18	37	42	29
Buycotting	45	32	52	50	32	47	44	43
Protesting	6	11	15	10	4	10	8	9
Collective action	2	4	4	3	7	3	3	4
N	1455	1479	1495	1474	1484	1480	1487	10354

Note: 'Have you done any of the following during the last 12 months? (All respondents) – 'yes' or 'no': 1. Have you complained to a retailer (supermarket) about the food they sell? 2. Have you boycotted any food types or brands in protest about food issues? 3. Have you bought particular foods or brands in order to encourage or support their sale, like fair trade? 4. Have you protested about food issues either in person, by phone, by letter or e-mail? 5. Have you been a member of a pressure group or organization that works to improve food?' Note that for all analyses in this chapter the total is the average of all 7 countries without any weighting procedure of country size. The 7 countries are not to be looked at as one population (universe).

TABLE 6.2 Political consumerism – boycotted and/or buycotted (%).

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden	Total
Neither	49	59	37	43	61	43	41	47
Boycotted and/or buycotted	51	41	63	57	39	57	59	53
	100	100	100	100	100	100	100	100
N	1455	1479	1495	1474	1484	1480	1487	10354

Note: This is an index including questions 2 and 3 from the battery on consumer activism. Political consumerism is if the respondents have answered 'yes' to one or both questions.

understanding of political consumerism. Based on these two questions, we have constructed an index for those who have either boycotted or buycotted or been involved both types of activities.

Table 6.2 shows the proportions of respondents who have boycotted and/or buycotted in the various countries. As a measure of political consumerism within the area of food, we find that this is a highly significant phenomenon in all seven countries. But the table shows that the levels vary across the countries. There are relative high proportions in France, the UK, Norway and Sweden, while proportions are somewhat lower in Italy and the Netherlands. We must, however, expect some fluctuations in these types of actions, depending on events preceding the interviews within each national context.

6.4.2 Abstaining from Eating Meat

As indicated in the introduction to this chapter, we will also explore abstaining from meat eating (characterized as 'vegetarianism') as an expression of political consumerism in this case of animal welfare – as an alternative to shopping for particular products in the market. How animals are being treated affects the consumption of meat: 66 per cent of UK citizens say that their concerns about the animal welfare situation have reduced their consumption of meat (one third in Italy, of 60 interviews). Also, health concerns can trigger a reduction of meat consumption, as stated in a Norwegian study. Reviews of earlier studies showed that the levels of vegetarianism vary from 1–2 per cent in Norway and France, to 6–7 per cent in the UK. Other studies claim the level in the UK to be 8 per cent (Kjærnes et al., 2005). The estimated level in Italy was 5–7 per cent, 3–4 per cent in Sweden, and 4–5 per cent in the Netherlands. No figures from Hungary could be found (Roex and Miele, 2005, pp. 11f.).

'Vegetarianism' is a flexible concept in terms of the practices it describes. Some vegetarians eat fish, some eat game, and some eat meat on certain occasions or on certain conditions. For the analyses here, we have constructed an index on the basis of frequencies of eating a number of meat items. Table 6.3 shows the proportions of respondents eating four out of five meat items less than monthly. While meat consumption patterns vary considerable across Europe, our results support that there are very few who drop eating meat altogether. The proportions are within the ranges indicated by earlier studies in the various countries. It is difficult to obtain robust measures, considering the ambiguity of the concept, the low numbers, and the fluctuations over time. The proportions of 'non-meat eaters' are highest in the UK and lowest in France. Compared to these two extremes, the other countries have proportions in the middle range.

6.4.3 The Independent Variables[39]

As suggested above, in this analysis we will introduce a number of explanatory variables in a step-wise procedure. The same sets of variables are used for the regression model using boy/buycotting as the dependent variable as the one using non-meat-eating. In this section, we will give a very brief description of the selected variables. The more methodological points regarding recoding, etc. are described in footnotes to the tables. We are showing the distribution for these variables across the seven countries, because the actual levels are important in our discussion of the significance of the various independent variables in explaining responses in terms of political consumerism/vegetarianism.

Step 1 involves traditional socio-demographic background variables, including gender, age (grouped), income, educational level, employment, religion, place of residence (urban/rural), and the number of children in the household. Table 6.4 shows (as expected) little variation across the countries for the demographic indicators, while socio-economic conditions are highly diverse, regarding incomes, educational levels and employment. Norwegians are by far the most wealthy, also displaying the highest levels with higher education and high employment rates, closely followed by Sweden. The British have high incomes, while educational levels and employment rates are in the medium range. At the other end, we find the Hungarians, with much lower average household incomes. They also

Table 6.3 Vegetarianism – eat 4 of 5 meat products less than monthly (%).

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden	Total
No	95	96	99	92	95	96	96	95
Yes	5	4	1	8	5	4	4	5
	100	100	100	100	100	100	100	100
N	1497	1498	1497	1500	1494	1492	1501	10479

Note: An index based on questions of how often respondents eat chicken, bacon and/or ham, sausages, pork, beef (daily, several times a week, weekly, monthly, less often, never). Vegetarians are defined as those who eat 4 out of the 5 items less than monthly (that is, they are 'allowed' to eat 1 out of the 5 products monthly or more often) (Lavik, 2006).

[39] For all indexes and variables there are some missing because of 'don't know', no answers and/or respondent filtered out because the question is not relevant. To include as many respondents in the analysis as possible, all missing are included in the main indexes or variables coded as 0. Most of these are not interpretable and are given the connotation NA (questions not answered for different reasons). One exception is the variable if one shops or not, 'RetailerNOT' which may have a substantial meaning. In the regression analysis these variables will be omitted for the sake of clarity. However, "not answered variables" are presented in this overview, just to show how they are distributed. They are always been calculated by the total number of each country, 1500, showing the percentage of the not-answered variables.

have relatively low rates of employment, while educational levels are in the medium range. The lowest proportions with higher education are found among Dutch respondents, while Italians have the lowest employment rates. For religion, our results reflect the strong division across Europe between Protestant and Catholic countries. The UK has the highest proportions of respondents with other religions, while the whole of Northern Europe, including France, have a significant number of people with no religion. The most mixed populations in terms of religion are found in the Netherlands and the UK. The proportions living in rural areas are highest among the French respondents and also high among the Norwegians, while fewest live in the country in the UK and Sweden. Finally, among our respondents on average two thirds live in households with children, with relatively little variation across the countries. The lowest number of children per household is found in

Table 6.4 Step 1: Background variables across the countries.

	HU	IT	FR	GB	NL	NO	SE	Total
Female % proportion (0=men, 1=female)	52.9	51.3	51.3	51.4	50.3	50.1	50.0	51.0
Age (dummies)								
18–30 (control group)	25	21	21	22	21	21	19	22
Age31–50	34	39	42	40	42	40	39	39
Age51–80	40	40	38	38	38	38	41	39
	100	100	100	100	100	100	100	100
N	1500	1500	1500	1500	1500	1500	1500	10500
Eurointeger								
Average Euro	613	2277	2568	2991	2799	3777	2712	2576
N	1174	563	1355	953	1145	1369	1387	7946
% IncomeNA	22	62	10	36	24	9	8	24
% High education[*]	63	62	59	68	50	90	79	67
N	1496	1496	1486	1475	1491	1489	1495	10428
% Working[**]	51	47	58	64	62	67	65	59
N	1496	1496	1499	1482	1498	1490	1497	10458
Religion (dummies)[***]								
None (control group)	20	10	36	27	47	24	43	30
Protestant	19	0	3	46	19	67	50	29
Catholic	55	85	56	10	25	1	1	33
Other	7	4	6	17	9	7	5	8
	100	100	100	100	100	100	100	100
N	1500	1500	1500	1500	1500	1500	1500	10500
Where do you live?[^]								
% Rural	39	38	50	28	35	40	29	37
N	1441	1500	1488	1493	1184	1495	1500	10101
% RuralNA	4	0	1	0	21	0	0	4
Number of children[^^]								
% Households without children (control group)	72	71	63	70	63	62	63	66
N	1077	1062	941	1047	943	933	952	6955
Average number of children	1.6	1.5	1.7	1.8	1.8	1.8	1.9	1.8
N	423	438	559	453	557	566	549	3545

Notes: [*] In the reference group: basic (7 years or less) or intermediate (8–10 years) = 0. High education is high school or university level (11 years or more) = 1. [**] In the reference group: pensioner, student, unemployed, full-time looking after the home, on full-time disability or sickness = 0, working (full or part-time) = 1. [***] 'What, if any, is your religion?' In the reference group: none = 0 (includes atheist/agnostic, humanist), Protestant = 1 (Church of England/Scotland, Methodist, Baptists, Presbyterians, etc.), Catholic = 1 (Catholic), other = 1 (other Christian (e.g. Orthodox), Muslim, Buddhist, Hindu, Jewish, Sikh, Jehovah's Witness, other, refused, don't know, not stated). [^] 'Do you live in a city, in a town or in the countryside?' In the reference group: not rural = 0 (city or suburbs, large town, small towns), rural = 1 (in a rural area or village, where countryside is less than 20,000 inhabitants). [^^] Number of children younger than 18 years old. The variable is an integer with 0 meaning no children in the household, and the exact figure means the number of children.

Italy, the highest in Sweden. There seems to be no way to summarize these characteristics into clear divisions across Europe. We will instead return to the observed levels regarding the various background questions and discuss those in relation to particular structural features.

Our analysis also includes a number of questions referring to value orientations, as already mentioned in previous sections. A basic distinction is made between opinions indicating orientation towards human benefits of improved farm animal welfare, here characterized as health and economic benefits, respectively. Two sets of questions indicate the degrees of orientation towards others, here towards animals; focusing on the treatment of animals and on animal rights, respectively. We also include a question on the importance given to animal welfare in general.

Table 6.5 presents the average results across the seven countries for these variables. Generally, we find very strong support for the health benefits of better animal welfare, most strongly so in Italy and Hungary. We must remember that the meaning of animal welfare may differ considerably. Many Hungarians are seeing animal welfare, for example, as more or less synonymous to animal health, while this is less the case in countries such as the UK and the Netherlands. Fewer, but still significant proportions, see economic benefits from better welfare. Here we find the highest proportions among Hungarian respondents, while Scandinavian respondents seem less optimistic in these respects.

Interestingly, very high proportions in all countries emphasize benefits for the animals, especially regarding the treatment of animals. There is some country variation, with most support to such questions in Italy, the lowest in Norway. We find much more diversity across the countries on questions that we have associated with animal rights, such as the acceptability of killing animals for food and thinking of meat as coming from live animals. Here we find relatively few among Scandinavian respondents, who find killing for food is problematic or who do not like to think of meat coming from live animals. Such problems appear to be much more prevalent among Italians and Dutch.

Taken together, the high proportions for supporting many of these statements, including those indicating self-orientation as well as other-orientation, indicate that there is no necessary opposition between the two. Instead, we find that considerable proportions of the respondents are concerned with human as well as animal benefits of improved welfare. This is also reflected in the overall high importance given to farm animal welfare in general, where as many as 70 per cent among the Italian respondents say that this is very important.

Step 3 in the regression analysis brings in more judgemental issues, including assessments of the current animal welfare situation and how animal welfare relates to other societal issues. We distinguish between ‘production oriented’ questions, what we have characterized as ‘instrumental oriented’ questions, such as taste, health, production volumes and the reputation of the country, and ‘politically oriented’ questions that relate to the consumer role, those of price and consumer voice. As a third issue, we include a question about interest, as indicated by the demand for information. Fourth, we have

TABLE 6.5 Step 2: opinions across the countries.

	HU	IT	FR	GB	NL	NO	SE	Total
Self-oriented: Health[*] – Average score	93.2	95.3	87.3	80.2	84.5	74.3	85.0	85.2
STD	15.17	12.61	19.18	23.61	20.64	25.32	19.79	21.20
N	807	1034	1210	1084	1151	1196	1250	7732
% HealthNA	46	31	19	28	23	20	17	26
Self-oriented: Economic[**] – Average score	55.9	41.9	49.3	40.7	46.6	37.5	36.1	43.3
STD	32.40	31.99	32.44	33.30	32.80	30.57	28.42	32.22
N	778	1004	1209	1155	1168	1269	1292	7875
% EconomicNA	48	33	19	23	22	15	14	25
Other-oriented: Treatment of animal[***] – Average score	69.2	79.8	71.0	70.1	68.0	56.7	69.8	68.7
STD	22.51	19.41	22.02	24.94	22.57	25.65	22.63	23.84
% Treatment of animalNA	57	45	19	30	26	24	18	32
Other-oriented: Animal rights[^] – Average score	41.1	45.4	32.6	37.6	44.2	16.0	15.5	33.1
STD	24.20	24.8	23.6	25.7	23.3	20.3	20.3	26.0
N	1388	1399	1490	1401	1464	1435	1462	10040
% Animals rightsNA	7	7	1	7	2	4	3	4
AWgeneral -Animal welfare in general[^^]								
% proportion - 4	17	10	19	23	34	27	27	23
- 5 (very imp.)	66	77	46	50	35	57	56	55
N	1462	1478	1497	1490	1489	1493	1496	10405

Notes: [*] The 'self-oriented health' value is an index built up by three questions. Filtered if buy eggs: 'Are the following factors very important, fairly important or not important to you? A. Hens are not treated with antibiotics or hormones, B. Freshness'. Filtered if buy beef: 'Now thinking specifically about beef… are the following factors very important, fairly important or not important to you? Animal is not treated with antibiotics or hormones'. The index is additive, reversed and standardized to vary between 0 and 100, the higher score the more self-oriented towards health. The average score has to be interpreted like a kind of average 'percentage' score. [**] The 'self-oriented economic' value is an index built up by two questions. Filtered if buy eggs: 'Are the following factors very important, fairly important or not important to you? Low price'. Filtered if buy beef: 'Now thinking specifically about beef… are the following factors very important, fairly important or not important to you? Low price'. The index is additive, reversed and standardized to vary between 0 and 100, the higher score the more self-oriented twords economic. [***] The 'other-oriented treatment of animals' value is an index built up by six questions. Filtered if buy eggs: 'Are the following factors very important, fairly important or not important to you? A. Treatment of hens, B. 2) Freshness'. Filtered if buy beef: 'Now thinking specifically about beef… are the following factors very important, fairly important or not important to you? A. Slaughtering methods, B. Raised outdoors, C. Treatment of animals'. All respondents: 'When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come, on a scale of 1–5, where 1 is never and 5 is always?'. This index is additive, questions 1 to 4 reversed, and thereafter standardized to vary between 0 and 100, the higher score the more positive one is to the treatment of animals. [^] The 'other-oriented animals rights' value is an index built up by three questions, asked to all respondents: 'To what extent do you agree or disagree with the following statements, on a scale of 1–5, where 1 is strongly disagree and 5 is strongly agree? A. It is acceptable to kill farm animals for food, B. It is acceptable to hunt game animals for food, C. When eating, I don't like to think of meat as coming from live animals'. The index is additive, questions 1 and 2 reversed, and thereafter standardized to vary between 0 and 100, the higher score the more positive one is to animals rights. [^^] 'Thinking of farm animal welfare in general, how important is this issue for you on a scale of 1–5, where 1 is not at all important and 5 is very important?'

included a set of questions about the truth-telling of various institutional actors, where we have formed indexes for market actors, public actors, and civil society actors, respectively (see also Chapter 3).

Table 6.6 presents the means for these questions for each of the seven countries. Compared to the questions in the former steps, there is relatively little country variation for the questions introduced in this step. The scores assessing the welfare situation in their own country are relatively similar across the countries, with the highest figure in Norway and the lowest in France. Turning to the three types of motivations for supporting political consumerism regarding farm animal welfare, we find relatively even distributions across the seven countries. Highest scores are found for the instrumental-oriented questions, with particularly high rates in Hungary and Italy. Least support is given to production-oriented questions. Interest in more information is also high across all countries, with the highest rates in Italy, lowest in Norway and the Netherlands (see also Chapter 5). As discussed in Chapter 3, trust in truth-telling is highest for public actors, lowest for market actors. Overall, levels of trust in actors appear to be lowest in Italy, highest in the Netherlands.

6.5 THE REGRESSION ANALYSES

We have carried out a logistic regression analysis, using two variables as the dependent variable, political consumerism (boy/buycott) and vegetarian, both dummy variables. The explanatory variables presented above were introduced in five consecutive steps. The results for the full model are presented in Table 6.8. At the bottom of the table, we present the relative improvement of the model for the consecutive step of variables, allowing us to discuss how much each additional set of variables adds to the explanation of variation in information demand. Since we have more than 10,000 observations in the dataset we have chosen a significance level at $p < .001$ in order to avoid Type I error.

6.5.1 The Regression Models – Step by Step

The *first step* introduces socio-demographic variables. In accordance with findings from previous research, women are more involved in food political consumerism of than men. Gender has an even greater effect on vegetarianism. This supports a picture of women being other-oriented and especially caring about animals' rights. But it is also in accordance with nearly all other social scientific studies of food, where women take greater interest in and responsibility for food and food related activities. Perhaps a bit surprising, age does not seem to have a significant effect on political consumerism or on vegetarianism.

Higher education forms a foundation for engaging in food consumer activism. This is expected not only because earlier research has come to the same conclusion, but political consumerism requires some knowledge about the products and issues that are subject to consumer activism. While we find significant effects on boy/buycott, the effect of education on vegetarianism is not significant. This is different for income. Sufficient personal economic resources affect the engagement in political consumerism, while we see the opposite tendency for vegetarianism. For vegetarianism, the higher the income, the less the likelihood of being a vegetarian. However, this result must be seen in connection with other variables in the analysis.

Interestingly, we find significant effects of religion on political consumerism as well as vegetarianism. Protestants as well as Catholics tend to be less involved in political consumerism, compared to people who do not belong to any particular religious group. On the other hand, higher proportions among respondents belonging to other than these dominant religions tend to be vegetarians. From Table 6.4, we can see that the proportions belonging to various religious groups are highly variable across Europe and, rather than being interpreted as only a matter of personal conviction, these results must be interpreted within broader cultural settings. The theory about how some religions are upholding a symbolic and social separation between humans and animals is confirmed by these results. However, looking at vegetarianism, one can see that the variable 'other religion' has a positive effect. This could be explained by 'other religions', including Buddhism and Hinduism, which may promote a vegetarian diet.

The urban/rural dimension involves proximity to farm animals as well as differences in availability and consumer cultures. We find that living in the country is associated with lower tendencies of vegetarianism, but with no significant effects on political consumerism. Experience with animal production may seem to affect the legitimacy of killing animals, while market activism appears to be less affected by the place of residence. We must remember here that these effects are controlled for the influence of country of residence, and we know that consumer roles, market structures, and socio-cultural effects of the place of residence are highly variable across Europe, opening for the possibility that we may find effects of place of residence in some countries, while not in others.

Another interesting finding is that if you have children, you are less likely to be a vegetarian. Underlying such a finding may be that vegetarianism is associated with certain social settings — outside what is conceived as the conventional family life. Models of 'proper meals' – which generally include meat – are also models that are associated with family meals.

Considering all the variables introduced in this first step, it is interesting to notice the different dynamics involved for the two types of dependent variables. Only gender and income affect both significantly. While educational level and Protestantism/Catholicism influence the degrees of political consumerism, it is other religions, place of residence and family that affect vegetarianism.

Turning now to the *second step* of the analysis, again we find rather variable patterns. Concern with own health does not seem to be associated with neither political consumerism nor vegetarianism – the latter perhaps a bit surprising. The only question in this step with significant effects on whether a respondent eats meat or not, is the one

TABLE 6.6 Step 3: Assessments, motivations, interest and trust across the countries.

	HU	IT	FR	GB	NL	NO	SE	Total
Assessments of AW								
AWconditions* Average score	50.5	49.1	46.1	51.6	49.0	60.3	58.1	52.2
STD	20.54	25.46	22.47	22.31	21.18	19.62	18.48	21.99
N	1217	1139	1468	1280	1440	1450	1345	9338
%AWconditionNA	19	24	2	15	4	3	10	11
Motivations for supporting political consumerist AW								
Production oriented** Average score	39.7	37.3	35.6	38.0	35.0	40.8	41.6	38.2
STD	25.05	26.07	24.68	25.58	22.72	22.87	21.02	24.18
N	1259	1262	1467	1354	1320	1342	1244	9248
%Production orientedNA	16	16	2	10	12	11	17	12
Instrumentally oriented*** Average score	87.7	87.0	75.2	78.7	71.1	79.8	78.4	79.6
STD	16.62	16.42	21.02	21.41	19.03	18.45	18.95	19.74
N	1380	1313	1487	1365	1385	1410	1357	9696
%Instrumental orientedNA	8	12	1	9	8	6	10	8
Politically oriented^ Average score	40.4	50.4	53.4	51.5	51.3	54.2	55.0	51.0
STD	24.28	24.81	23.79	24.25	22.57	22.94	21.33	23.86
N	1414	1440	1499	1462	1477	1470	1472	10234
%Political orientedNA	6	4	0	3	2	2	2	3
Interest								
Demand for information^^ Average score	74.7	86.8	84.4	68.1	55.2	51.7	64.1	69.4
STD	25.15	18.93	16.82	26.08	25.89	25.15	23.56	25.15
N	1354	1429	1486	1388	1436	1384	1407	1354
%Demand for informationNA	10	5	1	7	4	8	6	6
*Trust (Truth telling)^^^*								
Market actors Average score	46.5	36.1	43.2	43.9	45.9	44.7	49.9	44.3
STD	20.75	22.91	20.56	22.37	22.05	20.96	20.37	21.78
N	1318	1368	1487	1409	1423	1411	1434	9850
%Market actorsNA	12	9	1	6	5	6	4	6
Public authorities Average score	77.2	66.2	63.3	64.1	79.7	76.4	70.3	71.0
STD	22.90	24.77	23.48	27.02	22.89	23.64	23.59	24.87
N	1339	1370	1488	1422	1443	1426	1424	9911
%Public authoritiesNA	11	9	1	5	4	5	5	6
Civil society actors Average score	65.2	59.1	60.2	47.8	61.9	61.9	54.6	58.6
STD	22.69	24.12	22.89	26.27	25.09	27.86	29.30	26.13
N	1353	1420	1493	1450	1465	1447	1453	10081
%Civil society actorsNA	10	5	0	3	2	4	3	4

Notes: * AWconditions is an index of three questions: 'In your opinion, how well do you think the welfare conditions are for the following farm animals in your country, on a scale of 1–5, where 1 is very poor and 5 is very good?'. The index is additive and standardized to vary between 0 and 100. ** Production oriented is an index built up by two questions: 'To what extent do you agree or disagree with the following statements, please use a scale of 1–5, where 1 is strongly disagree and 5 is strongly agree? A. Good animal welfare will cost more and put farmers out of business; B. There is no difference between organic farms and factory farms when it comes to animal welfare'. The index is additive and standardized to vary between 0 and 100. *** Instrumentally oriented is an index built up by four questions: 'To what extent do you agree or disagree with the following statements, please use a scale of 1–5, where 1 is strongly disagree and 5 is strongly agree? A. Good animal welfare will improve the taste of the meat; B. Good animal welfare will increase the volume of milk cows produce; C. Good animal welfare will benefit the reputation of our country; D. Good animal welfare will improve human health'. The index is additive and standardized to vary between 0 and 100.

Table 6.6 Notes cont.: ^ Politically oriented is an index built up by two questions: ‘To what extent do you agree or disagree with the following statement, please use a scale of 1–5, where 1 is strongly disagree and 5 is strongly agree? A. To improve animal welfare, we must be willing to pay a higher price for food; B. How much do you think your voice as a consumer counts, on a scale of 1–5, where 1 is very little and 5 is a great deal?’. The index is additive and standardized to vary between 0 and 100. ^^ Demand for information is an index built up by six questions: ‘Thinking generally about food from farm animals (such as meat, eggs and dairy), is it very, fairly or nor important to include the following information on the label? A. A simple welfare assurance mark; B. A welfare grading systems like a different number of stars; C. Information about where the animals are kept; D. Information about what the animals eat; E. Country of origin; F. What farm they come from’. This index is additive, reversed and standardized to vary between 0 and 100, the higher the score, the more demand for information. ^^^ ‘Trust’ consists of three dimensions from the following questions: ‘Imagine a scandal concerning the welfare of chickens in your country. Do you think that each of the following would tell you the whole truth, only tell you part of the truth or would give misleading information?’ (Market actors is an index built up by three indicators:) A. The food processing industry; B. Food retailers; C. Farmer or farmers group; (Public authorities is an index built up by two indicators:) D. Public food authorities; E. Independent food experts; (Civil society actors is an index built up by two indicators:) F. Press, television and radio; G. Animal protectionists. All three dimensions are additive indexes, standardized to vary between 0 and 100, and the indicators are reversed, so the higher the score, the more the actors are trusted.

TABLE 6.7 Step 4: Barriers and types of retailers across the countries

	HU	IT	FR	GB	NL	NO	SE	Total
Barriers								
Lack of availability* Average score	66.7	55.2	52.1	50.2	43.2	53.6	53.9	53.4
STD	29.21	30.38	29.28	28.74	25.82	27.87	27.52	29.11
N	1299	1237	1475	1389	1393	1330	1412	9534
%Lack of availabilityNA	13	18	2	7	7	11	6	9
*Types of retailers***								
%Large superstore (in the reference group)	3	24	29	47	34	20	27	26
%Special shops	94	68	60	45	53	28	19	52
%Small/discounts	31	29	22	18	28	73	66	38
N	1214	1127	1263	1210	1168	1247	1243	8472
%RetailerNOT SHOP/NA	19	25	16	19	22	17	17	19

Notes: * ‘Lack of availability’ is an index built up by two questions: ‘To what extent do you agree or disagree with the following statement, please use a scale of 1–5, where 1 is strongly disagree and 5 is strongly agree? A. I care about animal welfare, but it’s too time consuming to look for welfare-friendly products; B. I care bout animal welfare, but cannot find welfare-friendly products where I shop for food’. This index is additive, and standardized to vary between 0 and 100; the higher the score, the less available are AW-products. ** ‘Retailers’ are divided into three types of market structure: Filter - if doing some food shopping: ‘I will now list different types of shops and I would like to know where you usually buy certain food products? A. Large superstore/supermarket; B. Small supermarket/convenient store; C. Discount store; D. Butcher; E. Other (includes mobile shop, door-to-door/home delivery, farm shop, organic shops, food markets and own production, e.g. they have their own chickens); Alt. ‘Do not buy the product: Where do you usually buy chicken, eggs, bacon and/or ham, beef’. ‘Large superstore/supermarkets’ are in the reference group: those who do all there shopping in these shops. ‘Special shops’: those who have bought at least one of the products at a butcher or other. ‘Small/discounts’: those who have bought at least one of the products at a small supermarket/convenient store or discount store. Some respondents may have bought products in both special shops and small/discounts and the sum of these variables therefore exceeds 100 percent.

TABLE 6.8 Logistic regression.

		Political consumerism			Vegetarian		
Step 1	Background	B	Wald	Sig	B	Wald	Sig
	Female = 1	0.186	**15.940**	**0.000**	0.600	**25.938**	**0.000**
	Age (18-30 in ref.group)						
	Age 31-50	**0.109**	**2.965**	**0.085**	**0.380**	**5.813**	**0.016**
	Age 51-80	**0.066**	**1.055**	**0.304**	**0.399**	**6.762**	**0.009**
	Eurointeger (Income)	0.0005	**12.563**	**0.000**	-0.0002	**13.570**	**0.000**
	High education	0.432	**71.951**	**0.000**	**0.221**	**3.241**	**0.072**
	Working = 1	**0.090**	**3.197**	**0.074**	**0.124**	**1.108**	**0.292**
	Religion (None in the ref.group)						
	Protestant	-0.233	**13.857**	**0.000**	**-0.242**	**2.413**	**0.120**
	Catholic	-0.291	**19.624**	**0.000**	**-0.142**	**0.698**	**0.404**
	Other	**-0.051**	**0.326**	**0.568**	0.974	**35.756**	**0.000**
	Rural = 1	**-0.065**	**1.888**	**0.169**	-0.465	**13.734**	**0.000**
	Number of children	**0.051**	**3.708**	**0.054**	-0.371	**22.729**	**0.000**
Step 2	Values						
	Self-oriented: Health	**0.004**	**9.243**	**0.002**	**-0.002**	**0.134**	**0.714**
	Self-oriented: Economic	-0.006	**57.350**	**0.000**	**0.000**	**0.024**	**0.876**
	Other-oriented: Treatment of animal	0.006	**16.218**	**0.000**	**0.008**	**2.853**	**0.091**
	Other-Oriented: Animals rights	-0.004	**13.659**	**0.000**	0.016	**50.169**	**0.000**
	AWgeneral	0.127	**26.864**	**0.000**	**0.200**	**9.212**	**0.002**
Step 3	Assessments of AW						
	AWconditions	-0.009	**65.510**	**0.000**	-0.015	**28.917**	**0.000**
	Motivations for supporting political consumerist						
	Production oriented	-0.008	**68.093**	**0.000**	**-0.004**	**2.315**	**0.128**
	Instrumental oriented	**0.002**	**2.711**	**0.100**	**-0.003**	**0.656**	**0.418**
	Political oriented	0.006	**36.403**	**0.000**	**0.006**	**6.064**	**0.014**
	Interest						
	Demand for information	0.009	**64.042**	**0.000**	**0.007**	**5.486**	**0.019**
	Trust						
	Market actors	-0.005	**23.122**	**0.000**	**-0.003**	**1.284**	**0.257**
	Public authorities	0.004	**12.636**	**0.000**	**-0.001**	**0.290**	**0.590**
	Civil Society actors	-0.003	**13.698**	**0.000**	**-0.005**	**4.272**	**0.039**
Step 4	Barriers & retailers						
	Lack of availability	**-0.001**	**1.168**	**0.280**	**-0.002**	**1.167**	**0.280**
	Retailers (large superstores in the ref.group)						
	Special shops	**0.166**	**8.894**	**0.003**	**0.797**	**23.414**	**0.000**
	Small/discounts	**0.040**	**0.611**	**0.435**	**0.045**	**0.127**	**0.722**
	Do not shop=1	**0.004**	**0.002**	**0.969**	1.039	**27.345**	**0.000**
Step 5	Countries (Sweden in ref.group)						
	Hungary	**0.005**	**0.003**	**0.959**	-1.241	**26.020**	**0.000**
	Italy	-0.736	**43.102**	**0.000**	-1.405	**27.783**	**0.000**
	France	**0.053**	**0.283**	**0.595**	-1.758	**33.960**	**0.000**
	The Netherlands	-0.646	**42.953**	**0.000**	**-0.652**	**6.891**	**0.009**
	Great Britain	**0.020**	**0.048**	**0.826**	**-0.301**	**2.213**	**0.137**
	Norway	**0.028**	**0.105**	**0.746**	**-0.046**	**0.044**	**0.835**
	Constant	**-1.061**	**25.983**	**0.000**	**-4.948**	**59.385**	**0.000**
	N	10507			10507		
	Cox & Snell R^2 (%)						
	Step 1	4.6			2.8		
	2	8.8			6.8		
	3	13.1			7.5		
	4	13.3			7.8		
	5	14.6			8.4		

Note: Sig. p < .001 – bold.

referring to animal rights. Political consumerism, on the other hand, is influenced negatively by economic concerns and positively by concerns for treatment of animals and animal rights. Overall, these values are influential for action through shopping, but much less so for meat eating. And there are no distinct patterns regarding self-orientation and other-orientation.

In *step 3*, we introduced a series of questions of a more concrete nature, referring to conditions on either the production or the consumer side. The overall patterns are striking in that only the assessment of the conditions for farm animals are (negatively) affecting the tendency to be a vegetarian, while nearly all of these questions have an impact on political consumerism. Solidarity with production actors, as indicated by the questions included in the 'production oriented' dimension, has a clear negative effect on boy/buycotting. The result is the opposite for those who are 'politically oriented'. Preparedness to pay a higher price is associated with stronger tendencies of political consumerism, while instrumental issues, such as animal welfare being good for human health and for taste, do not seem to matter.

Some researchers are worried that political consumers will turn their back on established modes of political participation, assuming they are participating less often in traditional politics than others, and that they are distrustful towards political institutions. A Swedish study on this matter (Micheletti, 2003, p. 11) shows that political consumers have a critical attitude towards the political institutions, but they are participating significantly more in the traditional forms of participation than others. Looking at Table 6.8, we see that in this study political consumers of food are not distrustful towards public food authorities. It is the market actors and civil society actors (animal protectionists and media) who are less trusted. These observed effects are not very strong, but they are pointing in a different direction compared to earlier studies. The background for this inconsistency may be issue-specific as well as country-specific effects. But it may also be a matter of how questions about trust are presented and framed (see also Kjærnes et al., 2007).

We might conclude that caring for animal welfare is an important and perhaps self-evident element of political consumerism — a question about doing 'the right thing'. The results may also suggest that concerns for animal welfare may mobilize people in their role as consumers. As Table 6.8 shows, actually being interested in animal welfare issues, and therefore demanding more information about them, is important.

The *fourth step* introduced variables addressing availability and shopping patterns. A bit surprisingly, we find that availability is not a condition – in any direction – for political consumerism. On the contrary, it is the tendency to be a vegetarian that is affected. It may be a tautology that people who do not shop for meat are more often vegetarians (but you may eat meat even though you do not shop). The tendency to for non-meat eaters to shop more often in special shops may reflect the flexibility of the vegetarian concept. It may also reflect that some – women – are very conscientious in shopping for their family in special shops – and being a vegetarian themselves (see Kjærnes, 2005).

In the *fifth and final step*, we entered all the seven countries in the study as explanatory variables. We see that even after having controlled for such a large number of variables, there are still significant effects of the country of residence. Compared to Swedish respondents, the dynamics behind political consumerism and vegetarianism are rather similar in the UK and Norway. When all other variables are controlled for, political consumerism is less prevalent in the Netherlands, but tendencies of vegetarianism are similar to Sweden. On the other hand, Hungary and France are significantly different when it comes to vegetarianism, with fewer vegetarians. Italy is different to Sweden in both respects, with less political consumerism and vegetarianism. Recalling the varying national levels of political consumerism and vegetarianism, we must expect different societal processes. These processes are much wider than those caught by the variables included in this analysis. The structures of the supply chains, the role of regulation and public authorities, the organization of household consumption and daily life, as well as public discourse differ in significant and characteristic ways. It is when combining such types of information with public opinions as measured in a survey that we can understand more of the interrelations involved.

6.5.2 The Explanatory Power of the Regression Models: Comparing Political Consumerism and Vegetarianism

From the discussion of significant effects in the previous section, we saw that the patterns for explaining political consumerism and vegetarianism differed. While non-religious persons tend to become political consumers, people belonging to religions other than the dominant Christian ones tend to be vegetarians more often. While considerations of health, economic effects and treatment of animals matter for political consumers, only what we have characterized as concerns for animal rights matter for vegetarians. Political and instrumental concerns and trust only matter for political consumerism.

In order to get a clearer picture of the relative importance of these effects, in this section we will look at how much each of the consecutive steps adds to explain variations in the respective dependent variables (Table 6.8, bottom). We have chosen the Cox and Snell R^2 to give estimates of the fit of the model as new variables are added. The estimates must be interpreted with care, only indicating tendencies. Moreover, the order in which these variables are added will matter for the measured ‘effects’ of each step, as the first variables will tend to statistically explain more of the variation than those added later. We see that each set of variables adds something to the explanation, but some of them rather little.[40] The *first* set of background variables matter more for political consumerism than for vegetarianism. We saw that it was gender, income and religion in particular that came out as significant, for political consumerism even educational level. These issues are linked to the social structure as well as to the organization of households and consumption and it is not surprising that they effect even these aspects of food consumption. But, in accordance

[40] We have not tested these differences statistically.

with research on other food related issues, the effects are not very strong. The *second* set concentrated on self- and other-oriented values, where we found that, while these values mattered significantly for political consumerism, only the questions of animal rights mattered for vegetarianism. However, the added effect is relatively strong in both cases, so we see that opinions regarding the killing of animals and linking animals and food are of considerable importance for vegetarians.

The *third* set of variables was more directed towards judgements of general institutional conditions. We see from the R^2 that these questions altogether have rather weak effects in terms of explaining variations in vegetarianism. But they do matter for political consumerism. We can guess that questions related to politics, production and trust form a background for mobilizing in the market. The *fourth* set is more concretely addressing the character of the distribution system and here we find minor effects in both cases.

Finally, in the *fifth* step, we added the country of residence. The improvement of the R^2 measured here is an improvement after all the other variables have been controlled for, a kind of residual effect. In both cases, we find an effect but it is not very strong. Our analyses in this chapter are based on a merged dataset including all country samples. This has allowed us to compare effects of, for example, social structure with those of the country of residence. On the other hand, as shown in other chapters of this report, the combination of conditions and the dynamics within each country are characteristically different. And these diverging conditions and typical patterns cannot be caught up in this type of analysis.

The two regression models indicate that issues related to animals matter for both the tendency to boycott and buycott and to leave out meat from the diet. While political consumerism is influenced by animal welfare-related issues, it is primarily the questions of killing animals for food and linking live animals and food that are influential for vegetarians. Overall, the selected variables appear to explain more of the variation in political consumerism than they do for vegetarianism. This assertion is strengthened by the earlier observation that fewer independent variables are statistically significant in the regression model for vegetarianism compared to the one for political consumerism. For example, whereas trust in institutional actors matters significantly for political consumerism, the same is not the case for vegetarianism. The general impression is that political consumerism is 'political' and relational, animal welfare being a mobilizing factor, while vegetarianism is more private and associated with personal convictions. But it must be emphasized that none of these models are very good to explain variations in political consumerism and vegetarianism. There are apparently many other conditions that matter apart from social structure and opinions about animal welfare.

6.6 CONCLUDING REMARKS

In this chapter, we have explored how concerns for animal welfare are involved in consumer activism. We have employed two different indicators. One refers to differentiating actions related to shopping and market conditions (political consumerism). The other one refers to eating habits, seeing declining to eat meat or vegetarianism as a political action.

We find that while boycotting and buycotting of food products are widespread across the seven European countries, vegetarianism, as measured by the propensity to eat meat, is much more rare. Politically motivated shopping practices are, in the case of food, more common among women, the well-off and highly educated. These findings are all in accordance with previous studies. Religion does have an impact, first of all in that secular respondents are more active. The interpretation of this finding may point to dynamics linked to animals and meat rather than market-oriented activism per se, where the more secular may have less problems with the association between live animals and meat (see also Chapter 4).

Overall, the introduced step-wise model turned to be much more relevant to explain political consumerism in the shop than to explain vegetarianism. As such, we find that worries for farm animal welfare do influence the tendency to boycott and buycott. Importantly, concerns characterized as 'self-oriented' and as 'other-oriented' do not come out as oppositions, but rather as mutually reinforcing elements. Poor animal welfare is bad for animals and for humans.

Judging contemporary conditions for farm animals as poor is a mobilizing factor, but only in association with trust in public authorities. Perhaps the latter is a matter of trusting experts and public information, both giving a background for consumer action. It is not surprising that political consumers tend to distrust market actors, but distrust in civil society actors was less evident. It may be that consumer activism represents in this case a clear alternative to the rather radical forms of activism of many animal rights NGOs.

Turning again to the overall patterns, we find that market-oriented activism is associated with concern for farm animal welfare. Yet, interest and concern is more widespread than political consumerism here. Again, we find that animal welfare gains widespread support as a good cause, many also have intentions of involvement via purchasing practices, and relatively fewer put this into action.

This quite consistent picture is contrasted by the dynamics we find for non-meat eating. Vegetarianism seems to be much less related to concerns for and mobilization around animal welfare. The concern for animals has a more fundamental nature, questioning the right to kill animals for food. This questioning may be evoked by the animal rights movement, personal problems of associating live animals with food, or it may emerge from religious convictions.

The general picture is of vegetarianism as more of a private matter, less to the politicization and commercialization of farm animal welfare. On the other hand, concerns for animal welfare, motivated by concerns for animals as well as humans, may mobilize market-oriented consumer activism, boycotting and buycotting.

7

FARM ANIMAL WELFARE IN THE FOOD MARKET: AN EXAMPLE OF INNOVATION*

7.1 INTRODUCTION

By using one empirical case – animal welfare in the food market – this chapter explores how consumers can be more or less actively involved in influencing market innovation processes. Consumers and their roles in innovation processes are little studied and still poorly understood in the predominantly economic literature on innovations. The hero of the classical innovation literature is undoubtedly the entrepreneur, the brave genius risking money, talent and social status by challenging established patterns and powers. In order to combine existing ideas, capabilities, skills, resources, etc. in new ways, they bring forth new products or processes, using new sources of supply, exploiting new markets, or organizing businesses in new ways (Schumpeter, 1934). This individualistic (even psychological) notion of innovation processes has later been modified considerably, to include more collective actors such as corporations (Schumpeter, 1949) and more relational and systemic determinants, such as national innovation systems (for example, Nelson, 1993) and industrial clusters (for example, Porter 1990, 2000). The systemic turn in innovation research has redirected focus towards the significance of collective routines (Nelson and Winter, 1982) as well as institutions (Freeman and Louca, 2001). The interdependencies between different sectors and institutional arrangements in the economy have been highlighted to explain variations in innovations and economic performance (for example, Lundvall, 1992). For instance, the role and performance of innovation-supporting and knowledge-producing institutions in regional networks have been emphasized (for example, Maskell, 2001).

The significance of cooperation in vertical supply chains as been emphasized too (for example, Lundvall, 1985). The importance of supplier as well as buyer cooperation for generating innovations has been subject to investigation (Roy et al., 2004). Despite this, the significance of ordinary consumers for the generation and success of innovations is poorly studied in this literature. Consumers, to the extent that they appear at all, tend to dissolve into the notion of demand (for example, McMeekin et al., 2002). They are mostly

* Presented at the ETE Conference 'Consumption, Markets and Enterprise: Vectors of Economic Change,' University of Manchester, 23–24 November 2005.

portrayed as passive recipients, without any involvement in the development of innovations, except for the option to adopt or not to adopt the final products (for example, Rogers, 1995). Consequently, consumers are most often categorized according to at which point they adopt in the diffusion process of an innovation.

Another bulk of literature, mostly sociological and anthropological, has given far more attention to consumers' roles and involvements in product development (Haddon, 2002) and in the subsequent creative processes of adoption and what has been coined domestication (Silverstone and Hirsch, 1992). According to this literature, innovations are not fixed entities, but change considerably throughout dissemination processes. As they are 'dressed up' to appeal to ever wider user groups, the initial (or prototype) innovation is modified and redefined in order to cement alliances of heterogeneous groups of users, suppliers, regulators and producers (for example, Latour, 1987). In addition, processes of adaptation and domestication often imply local adjustments and socio-technical embedding. This way, the appropriation process in 'the consumption junction' (Schwarts Cowan, 1989) also involves a kind of destandardization of the disseminated innovation and a subsequent local innovation from below (Sørensen, 1987). Even ready-made manufactured food products are subject to local innovations in kitchens all over the world every day. Dried or canned soups are not only pre-prepared soups as indicated by the instructions on the package, but open to a whole range of creative versions, perhaps even surprising and new dishes.

Consumers are often 'represented' by others in this game (Haddon, 2002), such as interest groups, media, consumer organizations, retailers or various regulators. Experts often take a leading role. Through market studies, consumer tests and various forms of consumer research, the innovator companies may be actively enrolling images of users in the design of new products (Lien, 1997). Despite this, it is obvious that consumers are weakly represented and tend to enter rather late in these processes. It is also true that different kinds of 'consumer representations' tend to be coloured by the interpreters' interests, position and perspectives. Like in the game of 'Chinese whispers',[41] what tends to take place is that interpretations of the needs, sentiments and opinions of consumers are communicated through middlemen to producers and innovators, and where the messages received at the end of the line tend to carry the mark and biases of its communicator. Hence, it should be no surprise that the development and introduction of consumer products in markets is a high risk game, where most products fail and billons of dollars are spent in vain. This is illustrated by the fact that barely 10 per cent of about 7000 new food products launched each year are still on the market two years after their introduction (AC Nielsen, 2001). This failure is obviously a problem for the industry, for retailers, as well as for consumers, and surely illustrates the wastefulness of modern capitalism.

One major problem in these processes is the construction of images of consumers to be included in the innovation and dissemination processes for consumer products. Applied

[41] In the game of Chinese whispers, a line of people are given a message at one end which is whispered to the next person down the line until it gets to the other end. The final recipient then announces the phrase that he or she has heard, and it is compared to the original. The classic example of this is said to be: "Send reinforcements. We're going to advance" that ends up as "Send three and fourpence. We're going to a dance."

consumer research often lacks an adequate understanding of the consumer/user and how they are constructed in relations of power, practice and discourse. These approaches often hold a rather individualistic and static picture of consumers. They lack the dynamic and socially embedded understanding of the innovations as well as their potential users, as described in the sociological literature mentioned above. The resulting outcome is often market failure, due to the fact that the targeted consumers may exist on the map, but not in the actual terrain. One major problem is that these approaches generally address only consumers as buyers – in the act of purchase. The whole process of buying goods, diverse forms of preparation and usage (and disposal) is rarely studied. And people are generally seen as (more or less rational) buyers, while other roles, as citizens, family members and caretakers, workers, etc., are overlooked. This narrow and often static understanding can become a very visible problem of understanding in cases where innovations do not remain a matter of more or less dissemination and adoption, but become subject to open contestation and social mobilization. Genetically modified foods represent one very clear example. Interestingly, however, this opening up and contesting of the issue seems to have been considerably more evident within the European context than, for example, in the United States or Japan.

Comparative consumer studies display considerable differences between countries regarding the construction and interpretation of consumer roles (Poppe and Kjærnes, 2003). We find these constructions to depend on particular social and institutional contexts, where role expectations and quality conventions are mutually defined and reinforced over time (Storper and Salais, 200x). That is, there is a tendency to develop some kind of consistency in expectations of responsibilities, entitlement and qualities between mutually dependent actors – between sellers and buyers who meet regularly. Hence, and in accordance with the before mentioned systemic turn in the innovation literature, consumer-role construction, quality conventions and forms of interrelations should be taken into consideration in the analysis of innovation processes related to consumer goods.

The nation state, with its differentiated institutional structure, tends to be, and has for some time been, the main defining context of consumption in our part of the world. Consequently, we find that peoples' everyday practices (for example, regarding meals, cf. Kjærnes, 2001), and understanding of their roles as consumers, in some respects vary more across than within countries (Poppe and Kjærnes, 2003). Hence, consumers in different countries may be understood as different constructs and they act differently because they are entangled in different forms of interrelations and historically defined quality conventions. For product developers and market strategists, this may imply that seemingly similar 'consumers' are more willing allies, or active participants and initiators, in some countries than in others, because they understand their roles differently.

The case of food, which forms the main framing of this analysis, clearly illustrates how an understanding of consumption requires more than studying demand – or the act of purchase. European food markets have been characterized in recent years not only by major organizational and technological innovations. There has also been considerable turbulence, media scandals, politicization of food issues, and public demands of changes on the supply side, all of which cannot be overlooked when trying to understand contemporary changes in the food market (and food regulations). Consumer trust has become a key issue. Responses of distrust refer not only to food safety, but to a range of issues, including quality, price, and a number of social and ethical issues not ordinarily included as characteristics of products or processes as such. It is quite clear that these responses refer to more than material qualities, but must be understood as socially constructed. The focus on trust also demonstrates that this is not only a matter of understanding purchasing and consumer preferences. It demonstrates that people – as consumer–citizens – can be involved as active participants, initiators, and set conditions. In the laboratory, technical work is carried out to invent and improve. In society, social work is carried out in order to adapt needs and preferences, convince, compete, and communicate. This 'Janus face' of technological research and development should become a focus of social research on food innovation. Consequently, upstream and network communication in the food chain is of outmost importance to foster innovations 'from below' and 'from the outside'.

New products should be analysed as adapted and modified through 'negotiations' between producers, sales people, retailers and ordinary people. Representatives of interest groups, media, and other key stakeholders are important actors in this negotiation process before products are 'accepted' by consumers. This is clearly illustrated by the case of food. In many instances, consumers are heard too late and thus do not receive the products they really would prefer. And producers lose money on their R&D efforts because the upstream feedback process is not working. Also, there is considerable underexploited potential associated with the development of new community-based consumer concepts, in particular those related to local food culture, wider notions of food quality, as well as more politicized conceptions of consumer demands.

7.2 THE CASE OF ANIMAL WELFARE-FRIENDLY PRODUCTS

We will illustrate this with one case from the food sector, related to the emergence of 'animal welfare friendly' products. These products may be understood as innovations, in almost every sense of the Schumpeterian definition mentioned at the beginning of this chapter. They combine existing ideas, capabilities, skills, resources, etc. in new ways to bring forth new products or processes, sometimes using new sources of supply, and they attempt to exploit new markets or even to organize businesses in new ways. They also challenge conventional producers and products in an economic as well as a political sense, representing an alternative vision or paradigm for the food sector. Finally, the case shows how consumers and consumption processes can form essential parts of the innovation processes. The contextual nature of these innovation/dissemination processes can be studied by comparing consumer opinions in different countries. We have chosen to focus on France, the UK and Norway. France represents a heterogeneous food market that is generally orientated towards an encompassing and localized concept of 'food quality'.

The UK has an economically liberalistic regulatory tradition and powerful supermarkets oriented towards specified and standardized notions of food quality. Norway has a social-democratic, kind of paternalistic regulatory tradition and a food market dominated by powerful and protected farmer cooperatives, very limited quality differentiation, and price oriented supermarkets. However, all three countries are populated with modern, concerned citizens, who care for the environment, their own health, as well as the welfare of their production animals.

People's engagement in animal welfare issues seems to have grown in recent years (for an overview, see Roex and Miele, 2005). This engagement is first of all visible in public discourse and in social mobilization. Increasingly, the well-being of farm animals has become an issue in the food market, in terms of special farmer-led schemes, industry and retailer initiatives, and as consumer expectations and demands. Food markets are differentiated increasingly in these respects. For example, not only have eggs from 'free-range' hens been introduced, there are also further distinctions between 'free-range barn' hens and hens having outdoor access. Furthermore, 'organic' egg production includes 'free-range' as well as a number of other criteria. With reference to this process of differentiation and innovation, there is considerable focus on 'consumer choice'. This is reflected in the public discourse, with claims referring to 'consumer' demands and pressure, but also to 'consumers' lack of responsibility and initiative. The problem of farm animal welfare is often framed as a problem of consumers' lack of willingness to pay. So this has become a dynamic area, with considerable testing and innovation, but also a controversial area, where responsibilities, norms and expectations are open to discussion.

The question to be discussed here is first of all to what degrees food products marketed as welfare friendly are adopted by the buyers. Important issues are how general interest is reflected in purchasing practices, and how these practices are reflections of/impacting on characteristics on the supply side, here mainly by referring to differences in national markets. This paper only allows us to raise some possible topics for further study. Later analyses will have to explore in further detail how, for example, food quality conventions come to include animal welfare concerns in various ways. We also intend to turn the question in the opposite direction – that is, what influence mobilization and consumer demands have had on the innovations taking place in the food market in this respect.

The chapter will rely first of all on data from the population survey (see Chapter 2). Reviews carried out in the seven countries indicate that markets, regulations and social distribution of responsibility, as well as consumption practices are basically different. Therefore, we expect the role of people as consumers and their interrelations with other actors to vary systematically across national settings. As already mentioned, we will concentrate on only three of the countries here, France, the UK and Norway.

7.3 PUBLIC INTEREST IN ANIMAL WELFARE AND FOOD PURCHASING PRACTICES

Without any reference to consumption activities, we asked the respondents first about how important farm animal welfare is for them. Not surprisingly, very few respondents say that this is of little importance (see Figure 3.4). There is some variation between the three countries. Higher proportions in Norway compared to France think this issue is important, with British respondents taking the middle position. So, even though animal welfare clearly is 'a good cause', this good cause is not equally important everywhere. Figure 3.4 also includes another question that addresses animal welfare in relation to meat purchases. The overall levels as well as national variations are different from what we were given for the general question. In Norway, only 26 per cent think of animal welfare when buying meat, while 37 per cent in France and 39 percent in the UK are considering animal welfare in their role as meat consumers. The gap between general interest and concerns when shopping is most evident among Norwegians, where 84 per cent see animal welfare as generally important, while only 26 per cent think of animal welfare when buying meat. Still, farm animal welfare appears as quite important even within the context of shopping.

There is even higher engagement when asking specifically about purchasing eggs (Figure 7.1). In all three countries, eggs represent the food item for which animal welfare concerns and shopping have been linked most explicitly, including innovations in supply systems. Moreover, animal welfare concerns often emerge as one of a wide range of consumer criticisms and demands related to production systems. In particular, to many people, better animal friendliness may be seen as one aspect of organic production. Therefore, we asked about free range and organic, as opposed to either having no special preference or buying eggs from battery hens. In the development of the questionnaire, we even tried to distinguish further between different forms of free range, but the piloting made it clear that was impossible within a comparative setting. According to Figure 7.1, hardly anybody say that they prefer battery hens. A majority claim that they buy free-range eggs and quite a few buy organic. The proportions are highest in the UK, lowest in Norway. In Norway, as the only country here, considerable proportions do not have any clear preferences in this regard.

As a different intake to the question about concerns and shopping practices, we asked questions about issues that are important when buying. Even though somewhat less pronounced, we find the same tendencies here for eggs[42] as well as for beef[43] (Table 3.3). The proportions emphasizing animal welfare in their food purchases are high everywhere. The French seem to put slightly more emphasis on conditions in egg production in their

[42] Continuing with eggs, are the following factors very important, fairly important or not important to you? Freshness/low price/organic/treatment of the hens/hens are not treated with antibiotics or hormones.
[43] Now thinking specifically about beef… are the following factors very important, fairly important or not important to you? Treatment of the animal/slaughtering methods/low price/raised outdoors for parts of the year/animal is not treated with antibiotics or hormones?

FIGURE 7.1 When you buy eggs, which of these do you normally buy?
Note: Among those who buy eggs; do not know excluded; weighted; N: FR=1248, UK=1312, NO=1335.

buying. Norwegian respondents display consistently low proportions of 'very important', for this as for the previous question. Importance placed on organic production of eggs varies from 12 per cent of 'very important' answers in Norway to 40 per cent in France. The UK forms a middle group.

Large proportions say that when buying beef, they give emphasis to animal welfare factors such as treatment of the animal, slaughtering methods and outdoor access. The treatment of the animal is considered generally the most important factor, with the average proportion being 66 per cent. The animal being raised outdoor parts of the year has an average of 60 per cent, while slaughtering methods has an average of 52 per cent. When adding all 'very important' for the three factors per country, the UK and France come out as quite similar, while Norway once again stands out at the bottom of the scale.

The respondents' answers about shopping practices do not in any way reflect market shares for eggs that are specifically labelled as animal friendly. This is particularly evident for the Norwegian answers. In Norway, 41 per cent claim that they buy eggs from free-range hens and 9 per cent buy organic. This means that 50 per cent buy eggs with some reference to animal friendliness. The Norwegian market shares for these products are much lower, about 5 percent. We can of course suggest that the framing in this questionnaire may influence the respondents, making them try to present themselves as more 'conscientious' and correct than what they do in practice. However, other explanations should also be explored. The standardized information appearing in food labelling is not the only reference for food purchases. Much wider and more practical categories and classifications may be applied, such as buying eggs with high quality in terms of freshness and taste, purchasing from a specific shop or supplier with whom the consumer has personal experience, or from a particular supermarket chain, local sourcing, domestic origin, etc.

So, taken together, we can say that in this case of farm animal welfare, where people are generally positive and engaged everywhere, their responses with reference to shopping vary considerably across the three country settings. Moreover, these responses are not in any way a direct reflection of what might be described as a demand for products labelled as 'welfare friendly'.

7.4 THE ISSUE OF FOOD LABELLING

If we think of animal welfare-friendly products as innovations that imply market differentiation, these differentiations must be communicated to the buyers in some way or the other. One question is then what kinds of information do consumers want and expect? The types of information relevant to the buyers will depend on how the issue of animal welfare is being framed, in what ways this issue is introduced as an aspect or issue of the food purchase, as well as questions of divisions of responsibilities and trust. It will probably also depend on more general characteristics of how consumption is institutionalized, such as quality conventions and the construction of the consumer role. For example, the more responsibility placed on the household and the lower the levels of trust, the more we expect demands for specific information about the provenance will increase. Consumers who are accustomed to complex and differentiated markets may wish for specific product information, but may be less engaged in issues of provenance. As a third position, we may see a situation with generally high trust and low responsibility placed on the consumer role, where information demands may be directed towards less specificity in both respects.

We asked whether it was important to have a simple welfare label, be given more specific information about how the animals were kept, if they wanted to know the country of origin, and whether the name of the farm was important. These questions are meant to capture issues of specificity/generalization with regard to product(ion) characteristics as well as provenance.

We see that respondents in the three countries have reacted very differently to these questions (Figure 5.1). Overall, the French put most emphasis on all these types of information, Norwegians the least. The country of origin is the most important type of information in France and Norway, while the British are slightly more interested in a simple welfare mark. The name of the farm is the least important information in all countries, but 50 per cent of the French respondents would still like to have this type of information. The French also want more specificity with regard to information about welfare conditions, since more respondents want the specific information than a simple mark. The opposite is the case in the other two countries, most clearly so in Norway. The Norwegians, while being the least interested generally, also prefer the generalized forms of information, both with regard to animal welfare conditions and provenance. The British responses place themselves in the middle, but it might be said that the respondents here emphasize product labels slightly more than those referring specifically to provenance, thus unlike respondents in the other two countries.

These variations seem to refer to three distinctions: the overall interest in information related to farm animal welfare, the degrees of specificity required, and the emphasis on provenance. The French come out positive in all three regards. Norwegians are the least interested, although domestic origin is important. The British are relatively interested, but they want lower specificity and provenance is less important. These patterns seem to reflect partly differences in the three food markets, where both French and British markets are quite differentiated, also with regard to the introduction of welfare-friendly products, while the Norwegian market is both generally and in this particular case undifferentiated (Roex and Miele, 2005). The differences between France and Britain need more explanation. We can speculate that this may be related to the different conceptions of food quality – whereas the French is framed by locality, the British is not – and whereas considerably higher proportions of products sold in France are fresh, higher degrees of industrial processing can be found in the British food market. In addition, generalization requires trust in institutional actors who transform specific knowledge into generalized information. As already mentioned, trust varies considerably across national contexts.

7.5 BENEFITS AND COSTS OF IMPROVED FARM ANIMAL WELFARE

From the question about information, we suggested that national variations in consumer responses may be interpreted as reflections of differences in the food markets. But we also saw that this may not be sufficient in order to understand variations. The survey questionnaire included several questions about general opinions on the benefits and costs of good animal welfare. These questions can give further insight into the different framings of the issue, thus pointing to conditions outside the context of market interaction. We will here present some of these questions that refer to characteristics of the food products as such, regarding quality and health, benefits for the food industry in terms of higher outputs, benefits for the reputation of the country, but also economic costs for the farmers.

7.6 CONSUMER ROLES IN DIFFERENT NATIONAL CONTEXTS

Animal welfare in food production does not represent an ordinary issue brought up in studies of innovation. Still, we have argued that changes now taking place in European

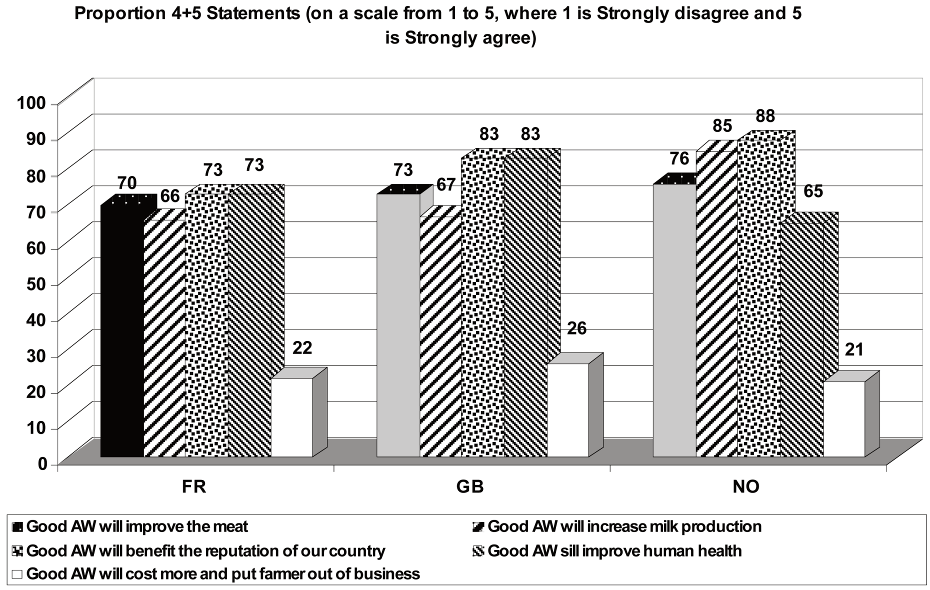

FIGURE 7.2 What effect consumers believe that good farm animal will have? (% answers 4+5).

Note: To what extent do you agree or disagree with the following statements? Please use a scale of 1–5, where 1 is strongly disagree and 5 is strongly agree (One answer for each option) A. Good animal welfare will improve the taste of the meat; B. Good animal welfare will increase the volume of milk cow produce; C. Good animal welfare will benefit the reputation of our country; D. Good animal welfare will improve human health; E. Good animal welfare will cost more and put farmers out of business.

food markets with reference to the welfare of farm animals clearly represent a case of innovation according to Schumpeterian as well as more recent definitions. In particular, we wanted to use this case to explore the varying and more or less active roles that consumers can take in relation to market innovation. By comparing how animal welfare is associated with food consumption practices in three different national settings, we have in this analysis tried to illustrate how consumers reflect and react according to specific conditions in the market place as well as to a wider institutional and cultural setting.

The simple distribution tables on animal welfare and food consumption presented indicate that while people tend to agree on general concerns, there are considerable differences when referring more specifically to the market context. Consumers, or consumer roles, are different. The role of animal welfare seems to refer to quite diverse structures and dynamics in the three countries. One important condition is probably that the degrees and forms of innovation regarding animal welfare in food production differ considerably. As another characteristic of the market structures, the degrees and forms of people's feedback as consumers differ.

Turning first to Norway, the consumer role does not seem of major importance for people's engagement in animal welfare issues. Several, quite well known, explanations for this can be mentioned. Market innovation through product differentiation has been very limited in the Norwegian food market over the last 10–15 years (Jacobsen, 2004). The market is protected and competition is limited. Improvements and initiatives take place mainly through public regulations, whether referring to food safety, nutrition, or animal welfare.

Even for quality, the state has taken an active role. Competition at the retail level is mainly on price. This is reflected in a passive, but also trusting consumer role, where choice and active participation is not very relevant.

In many ways France seems to represent a contrast to this. Animal welfare is clearly a consumer issue. Market information is emphasized and shopping is a relevant context for dealing with animal welfare. Again, market interrelations seem to be influential. The French food market is highly dynamic and differentiated. Differentiation refers not only to products, but as much to forms of distribution and retailing (Roex and Miele, 2005). Food quality is a major issue. In Italy, for example, the quality concept is quite different from the North European framing of food quality. 'Quality' includes a number of issues, not only taste and freshness, but also safety, nutrition and ethical issues. Animal welfare seems to represent just another issue to be included in this conception of quality. A major characteristic of this encompassing conception is that all of this is framed with reference to a specific locality. Here, this is reflected in the strong French focus not only on the country of origin but also on the farm. Therefore, we end with a rather particularized way of understanding consumer expectations as well as quality conventions.

Equally, the British context comprises a complex and dynamic market, but the issue of animal welfare and food consumption does not appear in the same way. People are concerned and they participate actively as consumers. However, the structures of animal food production and retailing are quite different, with retailer-led and integrated supply chains (Harvey et al., 2003). Products sold are often highly processed, increasingly in the form of ready-made meals. Quality conceptions are highly differentiated, distinct with regard to quality specifications, but generalized in terms of origins. Specifications for improved animal welfare are sometimes included as part of the differentiation (Roex and Miele, 2005). In this way, purchasing choices are made in a situation where the assortment differentiates explicitly according to a range of values and aspects. In this very complex setting, simplifying labels seem to become more important.

Even though we can talk of widespread consumer engagement in animal welfare issues in relation to food, these accounts show that people's opinions and practices are quite different. However, with the very brief characterization of differences in the food markets, we might perhaps have expected even bigger differences on the consumer side. One reason for that may be that animal welfare is not just an issue of market interaction. Public opinion is strongly influenced by what happens in other arenas, in the form of social mobilization and public debate, within regulatory and knowledge producing institutions, etc., all of which form an important context, even for the market innovations that are taking place in this area. This context is not only one of national institutions, but may refer to supranational arenas too.

Looking at farm animal welfare-friendly products in terms of innovations shows that it is insufficient to understand only the supply side. Besides, consumers as social actors have to be understood within a particular social and institutional context. Dealing with animal welfare within our three country cases indicates that this is relevant for analysing interrelational as well as systemic components of innovation processes.

8

CONCLUDING REMARKS TO PART I

8.1 REVISITING THE OBJECTIVES

According to the initial description laid out in the Technical Annex, this task was dedicated to identify problems and obstacles in consumer purchasing patterns and opinions about animal-friendly products. Identifying and analysing the extent and social differentiation of problems and obstacles as seen from the consumers' point of view was meant to improve the understanding of the extent and variations of these phenomena in European populations. It was these questions that made us choose nation-wide and representative surveys in the selected countries.

The specific objectives have been:

- to identify current purchasing patterns with regard to welfare-friendly food products in various European countries;
- to determine whether the demand for information on farm animal welfare among consumers is adequately met in terms of contents, format and information sources;
- to assess consumers' opinions about and trust in information sources and different labels;
- to investigate the main barriers to purchasing food produced at higher welfare standards, including availability, price, product characteristics, information, consumer opinions and trust.

Initially, opinions and purchasing practices were to refer directly to concrete product labels selected from the respective national markets. However, the reviews carried out previously (Kjørstad, 2005) as well as the market audit (Roe & Marsden 2007) soon made it clear that this would not be feasible. While there were very few relevant labels in some countries, other countries had a large number. Moreover, as many labels addressed more aspects than just animal welfare (like food quality or organics), there would probably be too many misunderstandings when referring to labels in a telephone interview. It was therefore decided to broaden the question from addressing specific labels to discuss information on animal welfare in more general terms, where product labelling would be included as one item out of several.

In order to capture consumer and citizen concerns on farm animal welfare, it is important to leave the technical and scientific terminology behind and ask very openly whether farm animal welfare is an issue and a problem that society should care about, what in particular they are concerned about, how problems are framed and explained, and who they see as responsible for taking the initiative. The retail/processor research meanwhile necessarily has had to discuss the technical issues around farm animal welfare within a commercial context of knowledge and experience of animal welfare.

Animal welfare is on the agenda, with a highly variable framing. There is increasing presence in the media, emerging consumer and citizen interest in ensuring good farm animal welfare, and growth in commercial initiatives led by farmer cooperatives and/or retailers and processors. However, we find many different motivations reflected in the commercial initiatives by producers and the food industry operating alongside a range of expressions of consumer and citizen concern.

This multiplicity is reflected within many countries. But according to our preliminary reviews, there are also varying patterns across countries (Roex and Miele, 2005). The idea behind using a comparative method is that systematic national comparisons can reveal basically different normative and institutional ways of and conditions for handling farm animal welfare. Decisive conditions are often taken for granted, such as the social division of responsibility, and can be identified more easily in a comparative study. It is obvious that a telephone survey gives rather limited possibilities for identifying such conditions. This is also why the project includes a number of other types of data and methodologies. What we see by analysing the survey data is that people in the various countries – as consumers and as citizens – respond in ways that are quite similar for some questions, for others highly diverse. These variations seem to be paralleled by differences at the levels of primary production, processing and distribution, as well as in governance structures and public discourse (for a first overview, see Miele and Roex, 2005; Kjærnes et al., 2007).

Rather than analysing the specific objectives one by one, this report has approached them from different angles. The major issue has been to investigate the degrees and the ways in which farm animal welfare is linked to what people think and do in their role and capacity as consumers – that is, as buyers and eaters of food. It is on the basis of this relationship and how it varies within and between populations that we can begin to discuss specific questions like demands for information, trust, and consumer activism. The report has explored national patterns in the emergence of farm animal welfare as a social issue and the question of consumer responsibility. It has also asked whether there are any indications that an explicit association between food and animals' well-being brings up deeper moral and cultural issues associated with animals as food.

8.2 HIGH PUBLIC ENGAGEMENT

Farm animal welfare is clearly an important issue for ordinary people across Europe. In that respect, a process of opening up seems to take place. Our findings confirm earlier studies in that respect. The results showed that for 87 per cent of the respondents in Italy, farm animal welfare is important, followed by the Norwegians. Rounding off the list were Sweden and Hungary, France, the UK, and, ranking lowest, the Netherlands with 69 per cent. But emphasis and worry is not the same. A majority is actually quite optimistic about recent trends. With regard to what has happened in the last decade, overall, consumers believe that conditions for farm animals have improved. Less than 20 per cent of those polled believe animal conditions have actually worsened.

People are interested and concerned, especially for sectors that are generally associated with intensive, industrial farming, such as poultry, but also pigs. Fewer headaches surface when it comes to the treatment of dairy cows. Other concerns include conditions during transportation and slaughtering of the animals. However, a majority in all countries but Hungary are optimistic about the welfare benefits of the modernization of the animal production sector in their own country. But trust is first of all directed towards animal scientists, public authorities and NGOs, considerably less towards the food industry and retailers.

Worries are unevenly distributed across the seven countries, including variable proportions of respondents who are unable to assess the situation and say they do not know. Worry about animal welfare is relatively strong in the Netherlands. The Dutch are troubled by welfare conditions as can be seen from the purchases of eggs and beef, and they have more faith in the market actors. As for the British, they worry, but are not as trusting of authorities, organizations or market actors. Norwegians and Swedes trust the actors and are not overly worried. National contexts may influence people's specific experiences, general evaluations of performance, as well as media attention. But worries (and saying they do not know) may also reflect an underlying uncertainty and scepticism towards the handling of farm animals in contemporary food provisioning systems.

We have also tried to explore whether this attention towards the welfare of farm animals implies more focus on the legitimacy of killing animals and ethical dilemmas involved in eating meat. There may be some tendencies that people are rather worried about the treatment of animals, and they also have more problems with the legitimacy of killing and eating meat, thus suggesting that a process of opening up seems to refer to the emergence of animal welfare as a social issue as well as in a personal questioning of meat eating. But these patterns are not very evident and other kinds of information are needed to confirm such assumptions. To most people across the countries studied, animal welfare seems to be a legitimate societal issue without raising any deeper moral concerns about food made from animals.

The main point of the survey analyses has not been to confirm what other studies have found about public engagement, but to explore how such engagement is or is not associated with the consumer role in terms of conceptions about responsibility, daily food-related practices, and information demands.

8.3 FOOD PURCHASES AND FARM ANIMAL WELFARE

To a limited extent, many Europeans think about animal friendliness when shopping for food. The proportions stating that they think of farm animal welfare in connection with purchases of eggs and meat are considerably lower than the general level of concern might indicate. But the picture is quite complex.

Even though Scandinavians are as enthusiastic about animal welfare as the rest of Europe, they seem to be a bit more sober about the benefits. Perhaps the Norwegians, not being very worried about welfare conditions and not much involved through their daily practices, see good treatment of animals as a self-evident part of routine procedure, thus indicating that processes of opening up are less significant than in the other countries included here. At the same time, undifferentiated interest and enthusiasm, as is indicated in Hungary and Italy, to some degree even France, might point in the same direction. Different conceptualizations of food and food production may explain why these countries end up at opposite parts of the scale in this study. While a ‘southern’ conceptualization of food quality is encompassing a wide range of issues and ‘good causes’, a more instrumental, disaggregate interpretation of food issues dominates in Norway, where aspects such as nutrition, taste, safety, social and political issues, etc. are all treated as separate. Introducing a new aspect will then also imply a demand for justification, a discussion of division of responsibility, and so on. From the figures presented in this report, responses from the UK and the Netherlands, partly also France, come out in between these positions.

The emphasis given to animal friendliness when shopping for eggs and beef are much higher than the market shares for labelled products. This may reflect a tendency for people to overestimate their own contribution. But, as shown by our analyses, there may also be a number of other types of explanations.

While interest and concern are shared by most people across Europe, the links made to their own food consumption practices are much more diverse. Variations are found between social groups, often along well-known division lines such as gender, age and educational level. As might be expected, we also find a tendency for welfare-related practices to be more widespread among people who are more concerned. However, this tendency is not consistent when comparing the seven country settings. First, high levels of concern are not reflected in the same types or levels of welfare-related practices everywhere. Second, a country with more engaged practices is not necessarily one with the highest levels of concern. A third point is that the particular ways in which people take farm animal welfare into consideration in their own food practices are highly varied across the countries. Therefore, it is relevant to discuss the links between concerns and consumer practices not only at an individual level, but also to look for national patterns or configurations. Such patterns may, in turn, be analysed in relation to specific institutional and discursive characteristics.

There may be several reasons for variations and 'mismatches'. One of the decisive factors is the character of the food supply. In some countries, there is a large degree of product differentiation, also reflected in a supply of welfare-labelled food products (Roe and Marsden, 2007). However, it is more common for animal welfare schemes to be included as part of broader quality schemes or to be part of a retailer brand strategy. The marketing of 'animal-friendliness' as part of a broader strategy may be one reason for the responses.

Making responsible purchases will depend on what people mean by animal friendliness. It seems likely that people's understanding of animal-friendly food items is much wider than referring to items that are labelled as particularly animal friendly. Apart from eggs, the supply of such products is in most countries very limited. But a 'welfare friendly purchase' may refer to much more wide-ranging conceptions. The most generalized approach is an overall approval of production systems and/or regulations in the respondent's own country. Welfare friendliness may be associated with particular industries (such as sheep farming in Norway), domestic origin (like in Sweden), small-scale and organic farming. The focus on production systems is also reflected in the popularity of free-range systems for egg and broiler production. Moreover, there is a relatively common association of animal welfare with product quality, especially prominent in France, but visible even in many of the other countries. Quality products (for the most part those thought of as having a superior taste) are widely assumed to result from production processes that exhibit higher levels of welfare. Often a link is made between healthy products and increased levels of welfare. The idea of 'good for animals, good for humans' is widespread, but seems to be particularly emphazised in Italy, Hungary, and France.

Added to this, the strategy of market differentiation to improve animal welfare is controversial. Many people, especially in Scandinavia, believe that animal welfare should *not* be a competitive issue, but that standards should be ensured by general minimum regulations. It is obvious that the consumer role and responsibility attributed to – and taken by – consumers are quite diverse across different institutional and political settings. It is therefore important to recognize that responses in public opinion surveys refer as much to the citizen role and generally accepted norms and expectations as they refer to action in the capacity as consumers.

Variations in the association between concern and involvement as consumers indicate that taking on responsibilities does not necessarily depend on individuals' interests and their ethical considerations. The distribution of responsibilities between consumers, the various market actors and the state can be highly variable from one country to the next. Taking on responsibility as a consumer must be associated with the possibilities to act – that is, there needs to be sufficient availability and relevant information in the shops where people make their everyday purchases. Availability (and price) can be a considerable problem in several, but not all the seven countries. However, this can not be reduced to practicalities. It refers also to the more politically and normatively framed issue of who should take on the responsibility for animal welfare.

8.4 INFORMATION ON ANIMAL WELFARE – A ‘CONSUMER’ DEMAND?

One central ambition of the Welfare Quality® project is to develop an information programme for citizens and consumers that can promote practical engagement in animal welfare issues. The most commonly used approaches to questions about information and consumption are based on individualistic models of decision-making at the point of purchase. However, analysing motivation, information demands and practices framed as individual consumer choices is of little help here, partly because the associations between opinions and practices are so poor (and clearly not unidirectional), partly because the impacts of institutional, structural contexts expressed in country differences are strong. There is no ‘standard’ consumer or isolated model of ‘consumer choice’. Instead, the consumer role needs to be analysed as a social and relational phenomenon embedded in and framed by institutional conditions and normative expectations.

We find that demands for information on animal welfare are widespread across Europe, including product-related information and other channels and sources. There is, however, notable variation in the overall level of information demand between the national samples, with Italians being most interested, the Dutch the least. We carried out detailed analyses to understand social and national variation in information demand. One purpose, of course, was to learn more about these demands and what they imply. But, in doing that, we also wanted to learn more about how welfare concerns are (variably) linked to purchasing practices.

Information demands are only weakly associated with whether the respondents think of animal welfare while shopping. Moreover, engaging in animal welfare does not seem to be mainly an outcome of the respondent personally being more ‘ethical’. It is problematic to interpret demands for information as an indicator of commitment or intention to become actively engaged. The variable patterns across countries indicate instead that interest, as reflected by information demands, is more a matter of how an issue such as animal welfare is framed socially and politically, and how this is linked to consumption, discursively and institutionally. Political consumerism or consumer activism seems to be important for information demands in Northern Europe, much less so in the South. These observations point to particular consumer roles and forms of consumer involvement, referring to a range of social, political and personal issues.

Trust is important for interrelations between food consumers and other actors in the food system. Surprisingly, the impact of trust in information sources on information demands is not very large. The reason is probably that trust matters first of all in association with people's own food-related practices (Kjærnes et al., 2007). As long as engagement in animal welfare (as reflected in demands for information) is not strongly linked to daily consumption practices, trust does not have a large impact. Different kinds of interrelations – for example, whether they are personal or impersonal (butcher vs. big supermarket) – matter for the forms of and conditions for trust.

Public opinions about farm animal welfare remain largely just that, a matter of opinion, a 'good cause' that most people find easy to agree with. Information demands generally reflect this positive attitude. There may be a number of explanations for that. The societal distribution of responsibility for farm animal welfare may direct attention towards very different arenas, such as regulation by the state. Market differentiation based on varying standards of animal welfare is limited in several of the countries, sometimes even in opposition. We see that many people are interested, but we also know that interest does not necessarily imply that people are worried about the conditions in their own country. And if they are, they may judge other forms of action more efficient – or see their own voice as a consumer as having little influence.

8.5 CONSUMER ACTIVISM FOR WELFARE IMPROVEMENTS?

As a different angle to understand farm animal welfare and consumer practice, we have explored how concerns for animal welfare are part of more general consumer activism related to food issues. We have employed two different indicators. One refers to differentiating actions related to shopping and market conditions (political consumerism). The other one refers to eating habits, seeing declining to eat meat or vegetarianism as a political action.

Political consumerism, as indicated by boycotting and buycotting of food products (for a variety of reasons) is widespread across the seven European countries. Politically motivated shopping practices are, in the case of food, more common among women, the well-off and the highly educated. These findings are all in accordance with previous studies. Religion does have an impact, first of all in that secular respondents are more active. We find that worries about farm animal welfare do influence the tendency to boycott and buycott. Importantly, concerns characterized as 'self-oriented' and as 'other-oriented' do not come out as oppositions, but rather as mutually reinforcing elements. Poor animal welfare is bad for animals and for humans. Judging contemporary conditions for farm animals as poor is a mobilizing factor, but only in association with trust in public authorities.

Vegetarianism, measured by the propensity not to eat meat, is much rarer. As expected, we find more vegetarianism among women, while socio-economic distinctions matter less. Not eating meat is associated with religion, especially with religions that include dietary rules on meat. Vegetarianism seems to be much less related to concerns for and mobilization around animal welfare. The concern for animals has a more fundamental nature, questioning the right to kill animals for food. This questioning may be evoked by the animal rights movement, personal problems of associating live animals with food, or by religious convictions.

We find very different dynamics for these two types of responses. The general picture is one of vegetarianism being of a more private nature, less associated with the politicization and commercialization of farm animal welfare. On the other hand, concerns for animal welfare, motivated by concerns for animals as well as humans, may mobilize market-oriented consumer activism, boycotting and buycotting.

8.6 PUBLIC OPINION AND CONSUMER INVOLVEMENT IN FARM ANIMAL WELFARE – SOME CONCLUSIONS

1. The results suggest wide consensus around the value of farm animal welfare and many people worry about the conditions. Across Europe, a large majority say that farm animal welfare is important, but they are not necessarily worried.
2. Most people are quite optimistic in thinking that good animal welfare is good for animals and for humans. Concerns about animal welfare rarely seem to raise more basic ethical dilemmas related to killing animals and eating meat. Nor do worries and involvement signify any widespread pessimism regarding the general capability to handle the problems in modern food production. The analyses do not reveal any opposition between concern for animals and their welfare, on the one hand, and humans and human interests, on the other.
3. Experts and NGOs are most trusted for telling the truth in case of an animal welfare scandal, public authorities being ranked in the middle, while market actors and politicians are least trusted. However, trust in institutional actors matter mainly in so far as people are engaged in animal welfare issues through their food consumption practices.
4. Compared to the overall levels of engagement, much smaller proportions associate animal welfare concerns and worries with their own purchasing practices. Still quite a few do think about such issues when shopping for food, many more than market shares for products with welfare labels signify. This may indicate a wider consumer definition of animal welfare than product labels offer.
5. There are both common tendencies across Europe and there is considerable variation.
6. Italian and French respondents are quite worried about welfare conditions in their own country, concerns are often associated with food purchasing, and trust is

relatively low. Hungarians worry and they are also more pessimistic, but animal welfare is of less relevance when shopping. The Dutch display lower interest, but many worry. Many do think of welfare conditions when shopping for eggs and beef. Trust is high. The British are quite similar, but trust is much lower. Finally, the Swedes and Norwegians are engaged; they are trusting and not worried. Particularly in Norway, animal welfare is rarely associated with the consumer role.

7. Apart from Dutch and British respondents, farm animal welfare issues and, in particular, the association with food purchases appears to be relatively new and undescribed. This means that knowledge is low, expectations are, as already mentioned, often broad and vague, and we cannot expect a lot of reasoning behind the answers. Farm animal welfare is first of all 'a good cause'.
8. Many people demand more information about animal welfare. There are no clear preferences in terms of forms or sources, and in many cases demand seems to reflect general interest rather than specific commitment via own purchases. Variation in information demand reflects first of all the experiences that people have, which depend mainly on the character of the food supply and the public agenda in their own country.
9. There is a gradual shift in attitudes and a growing awareness of welfare issues. This is partly prompted by animal welfare organizations and by the recent food scares, but also by the dramatic growth of quality labelling, notably including organic.
10. There appear to be three types of activism regarding food – and animal welfare aspects of food in particular. First, animal welfare may become part of a general concern for food quality. This concern is often associated with the place of origin and traditional types of farming. There is an encompassing concept of quality, emphasizing gustatory aspects, but including safety, nutrition, and farm animal welfare. This approach is found more often in France and Italy. Second, animal welfare becomes part of ethically and politically motivated consumer mobilization, a more critical consumer role that aims at making use of purchases to influence conditions on the provisioning side. Animal welfare may appear as a single mobilizing issue, but it may also be linked to other issues, such as organics or activism against global trade. Third, engagement is channelled through other forms of mobilization and activism, via ordinary political channels and/or animal welfare and animal rights organizations. Political consumerism will often emerge in conjunction with collective mobilization, as we have seen in the UK and the Netherlands. In Norway, and partly in Sweden, collective efforts have mattered more than consumer activism. The situation in Hungary is still too new to see which direction any mobilization will take.
11. Animal welfare as a condition for consumption may certainly become subject to turbulence and activism. Information, perhaps quite detailed, may in that respect represent an important condition for involvement and mobilization and may signify openness around production standards. Still, food consumption is generally highly routinized, embedded in tacit, taken-for-granted norms and expectations and organizational structures. These norms may shift, and there are signs of welfare friendliness becoming part of normal practice in some countries. At least for a proportion of the Dutch (and the British), animal welfare has become institutionalized as part of routine food purchases. Habitual purchases are rarely

associated with complex information needs and (if at all) may be limited to only very broad and simple symbols, such as brands, country of origin or a supermarket chain.

12. Consumer experiences and expectations are highly variable depending upon different situations. In many ways consumer experiences and expectations are shaped by what the market offers them and the interest amongst farmers, industry, food retailers, media, NGOs, and state legislation at varying national levels converning farm animal welfare. The situation is far from stable and indeed attention towards farm animal welfare is increasing in various ways in all situations, particularly as reflected in a growing attention towards market-based initiatives to improve animal welfare. Most of the retailer-led and/or producer-led initiatives end up being publicized as a label on a select few or none of the products from the animals produced to higher standards. A push for improvements may come from social mobilization on animal welfare. Under current circumstances, however, it is difficult to see how demands for reforms can be channelled to a large extent through what people purchase.

Part II

European Meat and Dairy Retail Distribution and Supply Networks: A Comparative Study of the Current and Potential Markets for Welfare-friendly Foodstuffs in Six European Countries

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Work Package 1.2
EU Food-CT-2004-506508

9

INTRODUCTION TO PART II

The overall aim of this comparative report is to present the current and potential market for welfare-friendly foods in Europe, which varies across the six study countries – France, Italy, the Netherlands, Norway, Sweden and the UK. This report feeds into the wider SP1 strategies deliverable and it provides useful market information for other sub-projects.

9.1 RESEARCH AIMS

The aim of task 1.2.3 was to carry-out in-depth interviews with up to 60 representatives involved in the supply and retailing of welfare-friendly foodstuffs, including abattoirs, wholesalers, manufacturers, regulators, industry bodies, and retailers to attain comprehensive insight into how the market for products carrying welfare claims has emerged. By following the chain from abattoir to retail outlet, from live animal to packaged meat on the supermarket shelf, we sought to understand the commercial practices central to the market for welfare-friendly products within specific supply chains. We sought to bring insights from these supply chains across different products and different national contexts together to identify the key dynamics of the current market and possible future directions, in order to understand what the impact of a new animal welfare assessment scheme and information system (as originally proposed by the Welfare Quality® project) would be on the market and for other changes in EU animal welfare policy.

9.2 METHODOLOGY

We chose a 'multi-sited' methodology (Marcus, 1995) to follow welfare-friendly products through a number of different sites to understand the multiple meanings and practices that surround products within the commercial process. It allowed us not simply to identify a linear supply-chain structure but also to consider the interlinkages between supply chains, how sites serve different, in some cases competing, commercial trajectories for products.

Consequently, products are understood as developed and mobilized by different actors and to be always in relation commercially to other products in the food retail market. Identifying these commercial relationships as a research aim at the outset is particularly important for understanding a retail market that consists of products derived from parts of an animal's body – for this fact encourages one to consider how different parts of the carcass that lived a higher welfare life are turned into products bearing this claim or not.

Between 8 to 13 representative products were selected in each country to create an adequate sample of supply chains. These products were identified during 1.2.2.1, and were selected for further detailed study in 1.2.3 because they fitted into a number of criteria. The criteria for selection were as follows: 1. each of the major national retail outlets were to be covered; 2. each of the five product categories (pork, beef, dairy, chicken and egg) also needed to be covered; 3. the products were a representative cross-section of the types of products we found with welfare claims in 1.2.2.1. The balance between retailer-own label products, manufacturer brand products and producer branded products varied in the selection of products between countries reflecting the distinctiveness of the national retail market.

For each product the intention was (where possible) to identify the following organizations within their supply chain and to interview relevant personnel at each stage in the supply chain:

- the retailer in which the product was sold – ideally, this included both the food technologist and the buyer/marketer for the category;
- the manufacturer/processor/packer of the product;
- wholesaler if applicable;
- abattoir.[44]

Along with these specific supply-chain interviews, other organizations were interviewed that allowed us to gain a wider understanding of the market. These were as follows: food industry organizations, NGOs and key regulatory bodies. A semi-structured interview method was used.

The questions for the retailers followed the following themes:

1. definition of animal welfare and company strategy;
2. perception of demand for animal welfare products;
3. approach to selling welfare-friendlier products;
4. how the supply chain works for manufacturer brand and own-brand label products;

The questions for the suppliers followed the following themes:

1. definition of animal welfare and company strategy;
2. perception of demand for animal welfare products;

[44] In the majority of the product supply chains, many of these traditional roles have been integrated into competencies of one organization.

3. why are claims for higher animal welfare used to sell this product?
4. what are the general animal welfare guidelines for suppliers from retailers?

The questions for the regulators followed the following themes:

1. definition of animal welfare;
2. what is their role?
3. how has the animal welfare regulation evolved – opinions?
4. how does current policy/legal frameworks aid of hinder development of higher animal welfare?

The detailed interview guides are included in the appendix (see Appendices 3–5). These themes formed the basis of the topics covered across all countries. However, national teams were free to add or modify questions depending on the context of specific organizations interviewed.

9.3 MEANINGS OF ANIMAL WELFARE AND OTHER WORD NOTES

It should be stressed that animal welfare, as defined by both the law and quality assurance schemes, is a contested domain. The current legislation concentrates on animal health and the provision of resources, echoed by many assurance schemes across Europe. The organic movement, and to a lesser extent the welfare-specific schemes such as the UK RSPCA Freedom Food scheme, place greater emphasis on the fifth freedom – the freedom to express normal behaviour. The 'higher' welfare claims of Freedom Food or organic schemes are not just the result of raising the legal minimum requirements, but because they promote an alternative production system that allows for 'normal behaviour'. Much of the controversy around farm animal welfare revolves around the often-contradictory attempts to incorporate the five freedoms.

The ongoing *ambiguity about the meaning of animal welfare*, however, has not stopped it being commercially advantageous to market products that carry welfare claims.

When we examine the various positions of retailer interest, and meanings of, animal welfare, we can distinguish *two levels of commercial concern* for farm animal welfare. These commercial concerns manifest themselves 'negatively' in terms of the management of risk and brand, and 'positively' through brand and product differentiation. In both cases qualification is sought from external bodies when defining animal welfare policies.

The two levels of commercial concern for animal welfare we identify are found along a continuum of *animal welfare as a process* within a variety of commercial interests. These positions illustrate how animal welfare is deployed through different commercial objectives. One retailer may embrace all levels as they target different products to different types of consumers.

On a different note, we adopt the use of the term ‘network’ as opposed to ‘chain’ to continually convey the commercial challenges of producing a whole animal and selling into markets for a range of products derived from this animal, not all of which can be sold as welfare friendly. The supply-chain metaphor emphasizes a linear process from farm to shelf that conceals the commercial complexities that support selling any products as welfare friendly. As a consequence, we are interested not only in the supply of a product carrying an animal welfare claim but in the wider distribution of products from animals that have experienced tighter production standards that imply better animal welfare, many of which are downgraded or may not explicitly carry an animal welfare claim but are in fact necessary to ensure market access. This is discussed in greater detail in Chapter 10.

9.4 OVERVIEW OF PART II

Part II outlines our generic findings about retailing practices for welfare-friendly products. It identifies the importance of retail *brands* in understanding how the market for welfare-friendly products currently operates through discussing the practices of brand management and how these relate to farm animal welfare. Two major dynamics are identified:

- brand protection and assuring for minimum standards of farm animal welfare within the supply network;
- positive use of farm animal welfare as a way to differentiate both product ranges and individual products.

The second half of Chapter 10 presents an overview of commercial relations between retailers, manufacturers, farmers/farmer cooperatives and NGOs/industry bodies.

Chapter 11 presents an overview of the particularities of the market for each of the product sectors – dairy, beef, egg, pork and chicken. Together, Chapter 10 and 11 present important actors in the retail distribution and supply networks through examining both the commercial relations between different actors and how there are distinctive differences between product sectors.

Chapter 12 presents summaries of the market for each study country, covering: regulation and the general interest in farm animal welfare, how the market for animal welfare-friendly products operates across individual product sectors, and what is the potential for growth in the welfare-friendly market. It explains how countries create an important cultural background for understanding why the market operates differently from country to country.

Chapter 13 is a summary of major pan-European bodies and their role in regulation, and wider bodies of representation. It considers how Europe as a trading block is responding to animal welfare.

Chapter 14 looks at the impact of global trade on the commercial practices presented in Chapter 10. Here we focus on the Eastern European market, pan-European buying groups, competition between EU and rest of the world, standards and labelling, global politics and health.

10

RETAILING PRACTICES FOR WELFARE-FRIENDLY PRODUCTS AND AN OVERVIEW OF COMMERCIAL RELATIONS BETWEEN RETAILERS, MANUFACTURERS, FARMERS/FARMER COOPERATIVES AND NGOS/INDUSTRY BODIES

10.1 RETAILERS

An important characteristic of both the current and potential market for animal welfare-friendly food products in Europe is the diversity in the commitment to, and involvement in, raising standards of farm animal welfare amongst retailers. Chapter 12 will present the distinctiveness of each country studied in country profiles. What lies behind this variation? The national market contexts in which they operate are very relevant for answering this question, and yet some more general factors – present across all markets – can be identified that appear influential to the presence and future growth of the market for welfare-friendlier products.

These are:

- the extent of state and market self-regulation;
- the degree of ‘power’ the retail sector has within the agri-food network;
- consumer and citizen concerns and interests in farm animal welfare within the wider context of ‘cultures of quality’;
- how farmers and processors are organized;
- the development of a competitive retail sector within each country;
- and the specific retailing cultures of particular retailers.

Despite the distinct differences in the size, power and culture of the retailing sector in each study country, the sector’s relative influence in shaping the agri-food system has been steadily growing. With the growing influence of large food retailers in the market has come increasing scrutiny of their practices and their products to create what Friedberg (2004) calls an 'ethical complex'. The activities of NGOs have had a major impact in raising the profile of animal welfare issues and putting issues such as caged hens and veal crates on the public agenda across Europe. This campaigning work has in many ways enabled the development of products that respond to these concerns such as free-range eggs, group-housed veal to hit supermarket shelves. Also, as the profile of farm animal welfare has been rising, the interest of retailers to stock welfare-friendly products has extended to the inclusion of a concern for animal welfare as part of their brand values.

The passing of the 2002 European food law (Regulation (EC) No. 178/2002, OJ L31, pp.1–24, 1 February 2002) placed a heavy burden on supermarkets in countries where national legislation did not exist already, to ensure the safety and quality of their food. This Regulation lays down the general principles and requirements of food law, establishing the European Food Safety Authority and laying down procedures in matters of food safety.

> 'This increasing responsibility of retailers with respect to food safety risk contributed to changes in procurement and sales practices in the fresh food sector… Atomized production structures and weak producer brands expose retailers to significant risk, vis-à-vis both government and consumers… [This led retailers to] become involved far more in the choice of production systems used by their suppliers, in particular via the imposition of private standards related to production practices:… codes of good agricultural practice [GAPs] and farm assurance schemes' (Codron et al., 2005, p. 271).

The extent to which retailers control quality parameters within their supply networks changes of course, and this reflects both how enthusiastically the legislation has been incorporated into national legislation and the relative 'power' of other sectors of agri-food chain. However, it has led to the astonishing growth of Quality Assurance Schemes (QAS) throughout Europe as a means of regulating quality through the retail distribution and supply networks, and retailers have been key market drivers in developing these QASs.

In order to understand retailing practices for welfare-friendly food products, we need to approach animal welfare as a *marketing* term, used by retailers to protect and differentiate their brand and the products they offer.

We will now look at three interrelated dynamics that are important in both driving and limiting the development of the market:

- 10.1.1 will focus on brand management – this is split into the related areas of brand protection and quality construction;
- 10.1.2 will focus on retailer–supply network relations and strategies that form the 'back story' to how 'quality' is constructed;
- 10.1.3 will look at the limitations in supply and demand that contextualize the current and potential market for animal welfare-friendly products.

10.1.1 Brand Management

> A link was established between those brands [own label], the retailers' corporate image, and consumer trust in the retailers' reputation such that the retailer became a guarantee of quality and consistency. Reciprocally, innovation in retailer branding became a key element in further enhancement of the retailer's consumer image (Wrigley and Lowe, 2002: 62).

Here Wrigley and Lowe outline the importance of *brands*, at the level of both the product and the retailers' corporate image, to retailing practices. We focus here on three interrelated aspects of this brand management.

Brand Protection and 'Due Diligence'

This is in effect the most straightforward position on animal welfare, deriving directly from 'due diligence' concerns and brand management, and it requires having some control over the 'quality' of their supply networks, especially for own-label ranges that are closer to the brand. In practice, this varies widely between the study countries. In the UK, the Netherlands, Sweden and Norway, the majority, if not all, of production going into the major retailers conforms to some form of QAS; in numerous cases, we find membership is a pre-requisite to market access. In Sweden and Norway, this has very much been driven by farmer cooperatives, which dominate both production and processing and own the most visible brand names. In the UK and the Netherlands, it has been much more retailer-led, with the cooperation of the industry as a whole. In Italy and France, we have found far less coverage of QAS within the supply network with the exception of a few particular retailers who restrict these demands to 'quality' products and ranges.

In the UK, the three largest retailers with a market share of over 60 per cent source their fresh meat, dairy and egg products from suppliers audited to Assured Food Standards (above legal minimum) or equivalent. The most proactive retailers in the UK have their own specific standards that explicitly include high farm animal welfare standards; there is the intention that all suppliers must meet them. Each retailer in effect decides what is their acceptable level of assuring farm animal welfare standards for the market they operate in.

There is also considerable variation within each country on compliance with retailer specific standards – in Italy, for example, Italcarni supplies Coop Iitalia. Italcarni collaborate with them to create the Coop networks in which animal welfare is one of the important requirements of the production specifications. For own-brand products, Coop Italia takes part in the selection of animals on the basis of indicators identified in collaboration with the CRPA, Centro Ricerche Produzioni Animali (Animal Production Research Centre). This research centre is a public limited company that is predominantly state-owned and provides research services relative to the agri-food and environmental sectors, with a view to promote technical, economic and social progress in the breeding farm sector and to contribute to the dissemination of the most advanced forms of eco-friendly agriculture. Coop has drawn up an assessment certification scheme so that the inspection body can certify conformity of breeding techniques with animal welfare guidelines. This increasingly close relationship between the retailers and animal welfare science research is also found in the UK between Tesco and the Food Animal Initiative, which is part-sponsored by the leading retailer. These indicate that the retail brand commitment to farm animal welfare in some cases goes beyond the immediate supply network and into commercial innovation within animal welfare science research. This is part of retailers horizon-scanning activities.

10.1.2 Category Assortment

In short, farm animal welfare standards in many instances forms an integral part of the 'quality and consistency' expected of retailers by consumers. However, this quality and consistency not only varies between retailers but also within individual retailer's assortments – in terms of standards required from suppliers and the extent to which the farm animal welfare part of these standards are used to sell the product. We will briefly outline two important factors that underpin this variation.

Fresh versus Processed Meat

Sourcing policies for fresh meat are more comprehensive with regard to animal welfare standards in all retailers interviewed than in processed meat products. This is for three main reasons.

First, animal welfare is seen as less of an issue for consumers the further away the product is from the animal itself. The further processed the meat product – for example, chicken on pizza – the less information about the meat is conveyed to the consumer about the production system and even country of origin.

Second, supply networks for fresh produce tend to be more integrated, with each retailer having only one or two, or possibly three, suppliers responsible for supplying each category. The greater range of processed products (in all categories) mean that supply networks are much more fragmented, with many more suppliers supplying products using many ingredients, which makes controlling the quality of the whole product a much more difficult task.

Third, manufacturer and tertiary labels have a much larger market share of processed meat products.

Own Label versus Manufacturer/Tertiary Brands

The development of retailers' own-label ranges has been very heterogeneous both across Europe and within individual study countries. The UK has been at the forefront of these developments, with the Netherlands following closely behind. Sweden and Norway have perhaps the lowest number of own-label ranges, explained by the dominance of farmer cooperatives that own the manufacturer brands. French retailers have begun to move into own-label ranges especially at the 'quality end' of category assortments. There are some Italian retailers who are developing own-label ranges in their meat and dairy products – for example, Coop Italia.

Retailers' responsibility and accountability for ensuring the quality and consistency of the products they offer is greater for own-label ranges. Own-label ranges comply with the standards retailers deem acceptable. In this quote, a 'quality' retailer is talking about Danish bacon produced to 'UK contract' specifications:

> 'There is some work going on on bacon, because I've made the decision that unless we can improve the standards the UK contract standards aren't good enough for [our] own label now. So if we can't improve those standards then I will switch it to a brand. I will still offer Danish Bacon but I won't put [our] name to it' (UK retailer).

This enables retailers to still offer a range of products to meet a range of purchasing habits without endangering their brand.

10.1.3 Product Differentiation and Own label Ranges

Retailer own-label ranges began life in the 1980s and have grown from strength to strength as retailers have become 'increasingly drawn into making significant investment in product specification, development, packaging and quality testing and the developmental role of the retailers' own food technologists became ever more critical' (Wrigley and Lowe, 2002, p. 62). This has been fuelled in part by their increasingly sophisticated information systems, which provide them extremely valuable market data on consumer buying habits and trends. Retailers have been pivotal in turning the agri-food industry into a 'consumer led' market, in particular in the UK, the Netherlands and France. In these countries, own label has been central to retailers' attempt to differentiate their brand on quality not just value. In part, this is the result of the growth of the 'hard discounters' who have successfully competed with the more 'broad church' on price and value, forcing these retailers to look to other avenues for differentiation.

On the shelf, this has been manifested in the establishment and diversification of the retailers' own-label ranges. These now take the form of 'good, better, best' (or value, standard and finest) tiers. The value tier tends to be industry standard, no frills offerings and, depending on the retailer, more likely to be imported. In the fresh sector, value ranges tend to use the cheapest cuts. The standard range again tends to be industry standard, with additional ‘bolt-ons’ for some supermarkets. These tend to use the more premium cuts, with more information conveyed about the quality of the product (logos, package descriptions).

As an example, we will use Tesco’s outdoor reared pork fillet.

This product has both the Red Tractor logo, telling the consumer this pork has come from an Assured Food Standards audited farm and slaughterhouse, and the Quality Pork Standard logo, the assurance scheme ran by BPEX, which concentrates on eating quality and consistency (that is, mainly post-slaughter practices). These logos help convey the quality of the product also conveyed in the description on the package:

> ‘One of our farmers, Rob Kennerley. Rob and his family are the third farming generation on their 400 acre mixed farm in Shropshire. *They have 500 outdoor sows*, using home grown cereals and legumes to feed their pigs. Stranimal welfare from their wheat is used for bedding and then returned to the land in the form of organic manure. *Rob and his family ensure that their pigs meet the high welfare standards Tesco’s require*’ (emphasis added).

As well as proclaiming their proximity to ‘their’ farmers and the environment-friendly credentials of their production methods, this text highlights the farm animal welfare credentials of the Tesco’s brand.

FIGURE 10.1 Tesco Fresh British Pork Fillet.

A good example of ‘best’ range is Monoprix’s Aubrac beef. This is certified to the retailer’s own quality assurance scheme for its ‘Gourmet’ range. Aubrac beef is supplied by a large and multi-membership producer organization known as l’Association Boeuf Fermier Aubrac, which is composed of six producer groups, including the CEMAC with 158 member farmers, the Bovi Plateau Central with 149 farmers. It involves strict breeding criteria and is 100 per cent extensive, natural grazing. In total, some 450 farmers are associated with the organization, though a larger number are involved with Aubrac husbandry in the larger region.

For Monoprix, Aubrac beef represents a superior quality product that associates taste and gustative quality with notions of 'terroir' and upland, mountain rurality.

> 'Our strategy has been to propose a segmentation based upon two types of meat: a standard (low-cost) beef derived from ex-dairy cows, and a high-quality beef product coming from identified groups of producers from a particular area with a particular breed. Furthermore, it has been Monoprix that has gone out and sought such a product' (Beef Category Manager).

This product highlights the strong partnerships between retailers, processors and producers in bringing a quality product to market, and within this setting, farm animal welfare standards.

10.1.4 Generating Spaces for Innovation: Generic, Flexible Cost-driven Sourcing to Bespoke, Differentiated, Quality-driven

UK food retailers are amongst the most sophisticated in the world and the demands they place on their suppliers, particularly their suppliers of own-label products, render the British food manufacturing industry one of the most efficient and innovative in the world. The implementation of efficient consumer response (ECR) and category management (CM) heralds the dawn of a new era in which value creation is the priority, with supermarkets and food manufacturers working together to exploit the diverse opportunities that exist in a cosmopolitan market place in which (relatively) affluent and increasingly diligent consumers are running out of time to purchase, prepare, cook and consume their food (Fearne and Dedman, 1999, p. 1).

Retailers actively seek relationships between themselves and suppliers that enable them to easily innovate within the market. The form these 'vertical partnerships' take varies between retailers and the different cultures of supplier/buyer relations (see Roe and Higgin, 2008). Innovation is never exclusively predicated on farm animal welfare issues, but it encompasses broader 'bundles' of qualities, within which farm animal welfare plays a greater or lesser part. But the ability to make welfare claims requires a guarantee that the product has been produced through welfare-friendlier production systems – therefore, it is dependent on a certain degree of coordination and cooperation between producers, suppliers and retailers. We will focus on two positions on the spectrum, outlined in Section 10.1.1 that indicate the different extent to which animal welfare standards are integral to the retailer brand.

The 'Proactive' End of the Spectrum

Example 1: Waitrose bespoke supply network

Their supply strategy is all about 'long-termism' and 'bespoke' supply networks delivering high quality products under the Waitrose brand, some of which have taken 15–20 to develop. Although more expensive than most of their competitors, Waitrose have successfully differentiated their products in terms of quality, especially in the meat and fish categories, where they have high trust and loyalty from consumers. Waitrose's innovative supply networks are the result of working directly with suppliers and producers:

> 'You've got a scenario where, because of Waitrose's long-term interests in their supply chain, you are in a position to invest in differentiation and work along with them in long-term solutions. We took, for instance, in bringing in a new breed between testing it and providing 100% of the shelf so that Waitrose could then market something, four years but you don't have a long-term view of a supply chain. You couldn't do that. Most of the UK retailers would not see that as a investment that they were prepared to make and probably thus haven't made the progress in some of their quality aspects that Waitrose have' (BQP).

Waitrose's standards explicitly cover farm animal welfare, and their promotion of both their brand and products uses their market leading position on farm animal welfare extensively.

Example 2: Coop

Coop handles 25 per cent of meat in Italy. One hundred per cent of the Coop-branded beef sold in the chain's stores is sourced from controlled Coop-branded supply chains. The animal welfare strategy involves only own-brand supply chains. Historically, the Coop brand label was based on animal welfare in the beef sector, especially in the high quality chain, where animal welfare first gained prominence. The Coop strategy is multidisciplinary and includes quality and safety requirements that are typical of Coop 'policy.' It also includes identification of animal welfare indicators in joint work with Universities, environmental requirements and a checklist of farm management and attention to production costs. This means that there is a balance between animal welfare

Box 10.1 'Safety is not cut right down to the bone'.

All Coop label meats are covered by our Coop Quality and Safety Programme, a set of production standards and checks and controls which guarantee health and quality. Coop selects only animals from the best farms, with particular attention for animal welfare and hygiene standards. We ensure animals are fed without animal meal and fats (except for during weaning). Their food is checked to be GM-free using the most advanced inspection systems. And for our own meat we make additional checks over and above minimum legal requirements. Each year Coop technicians carry-out more than 80 000 tests and 1 700 additional inspections on farms and slaughterhouses.

FIGURE 10.2 Coop quality assurance label.

and costs. The Coop finances research projects to identify assessment parameters of animal welfare that can be applied to Italian beef production. Coop does not develop ad hoc publicity for animal welfare, because it does not consider animal welfare only a marketing tool. As there is no national strategy, the Coop believes that specific information about

BOX 10.2 Coop meat traceability.

It is important to know where our meat comes from. It is compulsory for beef to be labelled clearly with the country or countries where the animal was born, reared and slaughtered, and a code number identifying the cut of meat and the individual animal or lot it comes from.

Coop knows that each phase of meat production has to be documented, and we supply our customers with additional information. We show the age and sex of the animal, (calf, heifer, bullock or cow) and give precise information on the slaughterhouse and butchery where it was slaughtered and divided, not just the country. Coop is the only distribution chain in Italy authorised by the government to show the type of food on our labels (GM free and plant origin.) We take as much care of our animals as we do of our consumer club members.

animal welfare is not sufficient to stimulate sales. Animal welfare, therefore, has to be part of overall commitment to meat safety and quality. Animal welfare is publicized in notices at butcher counters within the supermarkets and leaflets at points of sale.

In the Middle of the Spectrum

Example 1: ICA

Along with the three other major retailers in Sweden, ICA buy their fresh beef and pork from Swedish Meats, owned by the Federation of Swedish Farmers (LRF). These operate both their manufacturer brand (SCAN) and the ICA own-brand range, which includes products like Sunda Naturbeteskött (Naturally grazed beef). All their production and abattoirs are inspected through the state system as well as to BRC food safety standards.

> 'In Sweden everyone within the food industry work by the same rules. As such, there is no competitive advantage in choice of supplier and we all, anyhow, buy meat from the same supplier' (Buying Director).

Example 2: Averyon Veal in partnership with Martin Supermarket chain, France

Aveyron Veal is sold essentially to supermarkets and a few local butchers. Only the meat from carcasses that fail to obtain 'Label Rouge' certification are sold elsewhere (often exported to Italy). The majority of the 'Label Rouge' meat is sold directly to the Martin supermarket chain, where it is marketed as a high quality, gastronomic product, with both Label Rouge and PGI certification, which distinguish it clearly from the more standard 'white veal' (which has only a baseline assurance certificate). Martin sells no 'white veal' under 'Label Rouge' or other quality label.

The partnership established between the meat processor Bigard and the national supermarket chain Martin has established a retail distribution and supply network that delivers a quality product at a reasonable price and good value for money. In 2005, this partnership allowed for the commercialization of 11,000 veal calves through Martin supermarkets, six times as many as in 1996 when the partnership was initially set up.

The Aveyron Veal food network has developed into a partnership between three actors (see Figure 11.4), the producers (the farmers and their 'Groupement', the abattoir/conditioner, Bigard, and the principal buyer, the supermarket Martin). So strong are the links between them that the website of the producer group allows one to locate the nearest Martin – where the veal is hopefully available – to where one lives. From this collective common culture between the three principal food network actors, there has developed a common interest, though it should be added that there is no exclusive contract and the Aveyron Veal is also sold in other major supermarket chains (though in very much smaller quantities). The discourse is not, therefore, one of 'contract' but one of 'partnership', 'well-balanced commercial relations' and 'continuous dialogue'.

As a result, the Aveyron Veal benefits from highly effective marketing:

- regular presence at the annual Salon de l'Agriculture in Paris;
- displays and events held in the Martin supermarkets – including cookery displays of the rose-coloured veal (500 Aveyron veal producers participated in 260 such events within the supermarkets in 2005).

For the producers, their presence at the retail outlet is important.

> '"Rose at heart" veal when said by a supermarket salesman doesn't have the same effect as when said by the farmer. Its not the same. To give the product a sense of tenderness… we show how to cook it. When it is overcooked it becomes too dry… We regularly do demonstration cookery sessions in the shops. When the producer explains his product, its not the same as when the seller does' (Martin buyer, interview).

Supermarket-staff regularly visit the farms on which the veal calves are raised.

> 'We are greatly helped by the Director General who entirely shares our point of view and gets the category managers to regularly visit the supplier farms… Last September, they were all there, along with several store managers, 150 people in all' (Martin buyer, interview).

For the meat category managers concerned, such contacts make the supply network less abstract and more personalized. In the words of one meat category manager:

> 'The Aveyron Veal is important to us for 600 farmers depend upon us, as they keep repeating. It's a personal relationship, selling the veal because we are virtually their sole outlet. It is employment and it is the maintenance of the countryside. Everyone is concerned' (head of meat counter, Martin, interview).

It is worth adding here, that the veal is sold primarily for its distinctive gastronomic qualities and colour. This drives the methods of production and the increased attention given to the welfare of the animals. Having said that, it must be remembered that within the broader veal industry in France, the Veau d'Aveyron is not only a small concern but it is also distinguished from the mainstream veal sector, both by its focus on a rather different veal product (rose-coloured meat from a heavier and older animal) and the fact that it is far less vertically integrated into major agri-food concerns. Veau d'Aveyron are atypical veal producers who are involved in this activity. Furthermore, it is seen, by other veal sector actors, as offering a product that originally entered the market at a lower price than traditional 'white veal' though it clearly uses the 'veal' label and with successive quality labelling has seen its price rise. Again, this is a source of tension within the wider filière.

Aveyron Veal has seen a dramatic rise in sales volume. Over the last five years, the number of 'Label Rouge' carcasses has gone from 2,000 to 11,000, the majority of which are sold through Martin. Although the colour of the meat is not in itself a criteria for the 'Label

Rouge' (the principal criteria relate to the means of production and the body weight), it is clearly a key distinguishing variable for consumers. Recently, an additional 'Label Rouge' has been awarded for the offal of the veal calves (notably the liver). Again, the methods of production are critical to this and distinguish the final product (a light-coloured liver, much sought after by discerning consumers). In this, the Aveyron veal network is both dynamic and innovative.

At the Martin sales point, Aveyron Veal is frequently accompanied by specific advertising (particularly in the regional branches of Martin).

> 'The holders of the various certificates have their own labels and the quality marks were not very well integrated or harmonized. As a result, the marketing people worked with different colours and formats. Now all the quality marks and the classic meat types are in white with black writing and yellow for organic. This makes the shelves a lot clearer. We are the first to do this' (buyer, Martin, interview).

The price of rose-coloured veal is, on average, 10 per cent higher than for standard veal, though top quality white veal cuts still sell for a higher price than their rose equivalents. Therefore, the margins for rose veal are potentially higher.

At the 'Reactive' End of the Spectrum

Throughout Europe, we see a lot of variation between countries and within countries as to the degree to which farm animal welfare is raised as a concern on the supply side and marketed as a food quality on the retail side. While there is important movement towards both assurance and communication of farm animal welfare, it would be fair to categorize retail industry in Europe as predominantly conforming to legal standards – that is, not seeking higher standards than are required to by law. This position occupies the 'reactive' end of the spectrum. Generally, 'southern' European retailers have not moved to vertically integrated, quality-assured supply networks to the same extent as northern European retailers, where they act as a prerequisite to the more 'proactive' position on animal welfare outlined above. As we shall see below, any particular retailer may occupy all positions in the spectrum with regard to the full range of products available in the meat, dairy and egg categories.

Example 1: The French market

French meat and animal production all conform to base level legislative standards, an 'Etat de Droit'. Some producers may not be conforming but they are then acting illegally. The assumption amongst all actors is that base level legislation is enforced. There is no label or certification scheme to indicate simple conformity to legislation. All certification, assurance, etc., is seen as part of quality segmentation – that is, over and above mere conformity to legislation. Although France is always associated with certain types of quality labelling/certification/assurance (such as AOC, Appellation d'origine contrôlée), this in fact has, until relatively recently, in the case of animal products (with the exception of cheese), been the exception rather than the rule. It was the BSE crisis in the 1990s in particular that led to the dramatic increase in quality labelling and its use by supermarkets in both product segmentation and product traceability.

Above what we might call simply 'standard' meat products (conforming to the legislation but with no additional assurance or certification), there are traditionally three categories of 'quality' segmentation in France: certifications of conformity, quality assurance schemes, and specialist labels. In addition, there is organic production. Although on the increase, the majority of animal production (in tonnage) is still *not* being sold under one of these 'quality' labels.

Amongst the certifications of conformity (CCP), there is a significant range of schemes. Many of these are *not* labelled as such but serve to guarantee traceability within the agri-food network and crucially for agri-food network actors, to differentiate these products from 'standard'. They are increasingly used as entry points by supermarkets though not universally (see Table 10.1).

Amongst the most common CCPs are: VBF (Viande Boeuf Francaise) and the VPF (Viande de Porc Francaise), which certify that the animal is born, raised and slaughtered in France. Created in 1996 during the BSE crisis, the VBF has become one of the most common base-level certifications for supermarkets. Certain supermarkets use their own CCP scheme as an entry point (notably the beef products Jean Roze operated exclusively by Intermarche, which has been developed between the supermarket and the butchers group SVA-Jean Roze and is essentially an own-brand VBF certification).

The range of 'quality' labels is large, going from what we might identify as just-above legal requirements to the highly segmented specific products associated with AOC, certain Label Rouge products and organic. That range is explained in part by the French notion of 'quality', which is as much about provenance as it is about anything else.

TABLE 10.1 Relative importance of certified and assured beef products on supermarket shelves in France.

Supermarket	Total volume sold in 1997 (reference) (tons/carcass equivalent)	Different schemes as proportion of total on display (%) (2000)
Carrefour	70,000	70% Filiere Qualite Carrefour 30% VBF
Continent	40,000	15–20% Elevage de France 70% VBF
Auchan	55,000	10–15% Boeuf Selection Auchan 2% Organic
Casino	55,000	15–20% CCP or regional marque 65–80% VBF
Champion	40,000	20% Selection Champion 80% Standard
Systeme-U (Ouest)	20,000	60% Gamne superieur 40% gamme economique (standard)
Intermarche	110,000	80% Jean Roze CCP
Leclerc	115,000	Varies hugely by store
Monoprix-Prisunic	15,000	Monoprix Gourmet Standard

Source: Sans et al., 2002

Which dynamics are behind the low coverage of quality assurance at the 'standard' end of the market?

- Only really since the BSE crisis has any attention been given to non-Label Rouge or non-AOC labeling and certification. Standard production networks still dominate, with segmentation arguably concerning only a relatively smaller proportion of total sales.
- French origin meat (VBF – Viande Bovine Française) is the dominant entry scheme. Although for certain supermarkets, this represents a large proportion of sales of red meat, by no means does VBF act as an entry criterion.
- The strength of the producer groups and the inter-professional bodies is significant and as long as they can demonstrate conformity to legislation and standards (NF – Normes francaises), non-segmented meat products are still dominating.
- Certain supermarkets are developing their own CCP equivalents (notably Carrefour and Intermarche), while others have embarked upon their own Label Rouge schemes.
- It is estimated that VBF meat is on average 10–12 per cent more expensive than standard meat for the consumer.
- The continuing importance of butcher shops (or counters in supermarkets) is seen as guarantee of meat quality, irrespective of whether the meat is from an assurance scheme or certification scheme.
- The lack of assurance schemes should not be taken as a lack of quality. Many consumers (and retailers) will sell meat on the basis of breed type or geographical origin (outside the realm of an official label). For many consumers, buying steak labeled as 'Limousin' or 'Charolais' constitutes a sign of quality, whether or not there is an assurance scheme linked to it.

Conclusion

We see a range of initiatives within this spectrum of 'ethical modernization' that is influential in the market for welfare-friendly products. Undoubtedly, the key mechanism that facilitates this vertical cooperation, or negotiation on technical and ethical standards through the supply network, is the quality assurance scheme. As the last point above indicates, although the lack of assurance schemes should not be taken as a lack of quality, what QAS does allow is a certain level of transparency between different industry actors and consumers. It both assures that certain standards are being met and they function as a marketing tool for communicating those standards.

For example, one of the largest supermarket chains in the UK has a list of suppliers that have been agriculturally approved – in other words, suppliers who meet their codes of practices. Uniquely, they have an agricultural management team who oversees this process:

> '[We use the] farm assurance scheme… we feel that's most robust in that area and then we have ****'s standards on top of that in certain areas, particularly in transport

> and slaughter where we can implement those standards easier. Then we have aspirational standards within those codes of practice that suppliers don't have to comply with, but they are like blue-sky kind of areas where we are all working to move the industry on.… If you take red meat, so beef, lamb and pork, we have a farm assurance scheme we feel is best in that area as the farm standard, because the industry is so much more fragmented that it is very hard for us to actually implement our own standard at the farm level, so we use the farm assurance scheme as the farm standards and then we have our own standards for transport and slaughter. For more integrated supply chains like poultry, we have our own. We use the ACP (Assured Chicken Production) scheme for chicken at farm level plus some add-ons that we feel our customers require of us or that their expectations are that we are meeting those standards. So some of the farm standards are slightly higher than ACP and then our own standards again for transport and slaughter' (UK retailer).

This retailer highlights the difference between more 'fragmented' supply chains where generic quality assurance schemes are used to ensure standards but which mean little added value '*****ness', to more 'integrated' supply chains where production standards can be differentiated.

So following Foord et al. (1998), 'we suggest that the emphasis on interactive, flexible and stable supply *networks* is a key retailing strategy', which underpinned retailer competition in terms of brand and assortment differentiation. Innovations in farm animal welfare can be seen as a competitive 'networked achievement', negotiated between retailers, suppliers, farmers, certification bodies and the animals themselves in response to demand from consumers, civil society and government.

10.1.5 Limitations to Supply and Demand

The agri-food system is an idiosyncratic sector within our modern industrial economy. Even in the most intensive systems, farmers work with living organisms and 'natural' cycles of development, disease, etc. that distort any simple picture of supply and demand economics. To quote an organic milk cooperative in UK:

> 'Milk doesn't come from factories, it comes out of a cow. You can't just turn the taps on. It is that lack of understanding of what is a relatively inflexible supply chain' (OMSCo).

There are many limitations to both supply and demand that are particular to the meat industry and indeed particular to specific sectors. We will review some of the major limitations to the growth in both supply and demand in the current and potential market for welfare-friendly meat products.

10.1.5.1 Limitations to Growth in Supply

Legislative Restrictions

These do not apply to restrictions on higher welfare systems per se, but rather to the areas of conflict between the growth in extensive systems (especially in laying hens, broiler chickens and pigs) and environmental legislation and planning regulation. To quote *The Ranger*:

> 'There is growing evidence that expansion in the free-range sector is being held back by local authorities as planners increasingly show the red card to proposed new units' (*The Ranger*, 2006).

Although somewhat alarmist, the article does draw attention to the trials of getting any new free-range unit approved by the local council, with local residents views, impact on local traffic, landscape and environment, taken into consideration. The leading UK egg supplier say this is a considerable barrier to increasing supply in the short term and potentially in the longer term. Environmental restrictions concerning management of waste products as well as biosecurity have also had an impact. Here one large integrated pork producer comments on some of the difficulties facing the expansion of extensive pig farming:

> 'We need to have land available to keep outdoor pigs, and other EU regimes which are not directed at pigs could have an indirect effect on pigs as well: attitudes to having pigs on farm, and even such things as the IPPC [Integrated Pollution and Prevention Controls]. It doesn't affect us directly, but it will affect our farmers, who might say "well, thresholds there mean I have got to invest X, so I will cut back rather than expand"' (British integrated pork supplier).

Lack of Capital for Investment in Growth

Producers in Europe survive on very low margins and varying levels of subsidy support. There is little appetite and means for investment in new production systems in a still relatively risky market. This is mirrored by lender's reluctance to invest in (mainly small- and medium-scale) agriculture. In France, Italy, Sweden and Norway, where there is a tradition of cooperation within the farming community, cooperatives have provided a stable structure for farmers to invest in, market and profit from innovative production and processing. In UK, where there is little tradition of farmer cooperatives, suppliers/manufacturers/packers have stepped in and provided competitive loans for producers either to start up extensive production or expand their current business.

Significant investment is generally linked to high forecast growth. These forecasts are inherently unreliable. The organic milk market in UK went from a state of undersupply throughout the late 1990s and 2000 to oversupply and a farm-gate price crash in 2001. High growth forecasts by retailers, coupled with high farm-gate organic milk prices and government subsidies to encourage conversion to organic farming, persuaded many dairy farmers to turn organic in 1999 and 2000. This led to a sudden flood of organic milk in 2001, which was met with a lower than expected demand. This resulted in a drop of around 10 pence per litre of farm-gate prices and many farmers either going bust or opting out of organic production. Therefore, steadily increasing demand has been met by reasonable flat increase in supply resulting in a market in undersupply. In contrast, the free-range production has expanded continually in the last 10 years to meet ever-expanding demand.

Retailers have to balance sourcing products at the lowest possible price and to maintain supply networks that are financially sustainable and innovative. There is a notable difference in this compromise between the different retailers across Europe.

10.1.5.2 Limitations to Demand

Disassemblage and Carcass Balance

The meat industry differs from most other industries because it does not assemble products but disassembles carcasses to make different products. Thus supply does not easily translate into demand. Some parts of the carcass may be in much higher demand than the rest of the carcass; this produces an imbalance. For example, there may be shortage of white chicken meat but a surplus of dark meat, which cannot be profitably met through increasing production.

Much of the innovation within the retail distribution and supply network takes places in this area of carcass balance: through stimulating demand for unwanted cuts through innovation in marketing and processing, and increased opportunity for utilization of the carcass with the globalization of the food industry, to export unpopular cuts to a home in another country where different cultural practices exist. In other words, this process is about identifying a commercial home for as many parts of the carcass as possible in order to get the maximum financial return. Development in the manufacturing of animal products has enabled the manufacturing industry to squeeze out profit margins through the skill with which they handle the balance of the carcass. Thus in some way deflecting the price pressures they endure from the retailers.

Example: Chicken

> 'When you're selling [brown or white meat] into that market, you need to find a home for the other parts and probably our biggest difference in costs of production between ourselves and Thailand is the fact they can actually sell everything in that chicken.… What we have to do is we have to try to persuade the consumer in all sorts of different ways and formats to buy into the dark meat. And that's one of the biggest marketing challenges within chicken' (Chicken manufacturer).

'Different ways and formats' have been the site of a processing revolution that has seen massive growth in further processed products, such as ready meals for both retailers and the food service sector that use dark meat. In addition, there is a seasonality in the problems surrounding brown meat. During the barbecue season there is not a problem with dark meat, whereas there is a problem during the rest of the year (40 weeks).

There is also a market in exporting small bits and pieces of dark meat, such as legs and feet, and this can improve the costs of production dramatically; without doing this it actually costs to dispose of these products properly. There are tight environmental controls that have come in as a result of BSE, which has meant that the disposal of products is huge in the UK in comparison to other countries. Anecdotally, the walkie-talkies (the beaks and feet) are sold in South Africa to be cooked up; the beaks are used for children who are teething and the feet are used for stock. However, in a UK retailer these products would not be acceptable on the shelf. So there is a lot of export of chicken feet from the UK to China and other places.

For birds produced under special production systems, such as free range or organic, there is still this issue of carcass balance. It is more difficult to balance the carcass for these birds.

> We can't get a dark meat sale within the traditional route because the traditional slow-growing breeds that we use tend to be quite yellower in colour and also the shape of the bird is very, very different to a conventional bird. So if we end up having to sell into wholesale… it's often very, very difficult to sell' (Chicken Processor).
>
> '[It occurs with] organic in particular because what you're looking for in wholesale is you're looking for uniformity and you don't necessarily get that within free-range and organic. However, what we do get is we get better dark meat sales in free-range and organics because, as I said before, you have got [AB] consumers who are possibly more willing to experiment who will use their thighs for curry, etc.' (Chicken Processor).

For the higher quality birds, the biggest proportion is still sold as whole, but there is a growing market for portions of higher quality birds and thus an increasing pressure to balance the carcass in order to generate better returns on production.

Producer-driven Reluctance to Differentiate Products by Production Method

In the Scandinavian countries of Sweden and Norway, although more so Norway, the predominance of the farmer cooperatives and the culture of 'equivalence' results in an unusual situation whereby it is difficult for product to be marketed as 'better' than something else when it refers to the method of production. Thus, when it comes to marketing products as organic or non-organic, organic can be used on product packaging but positive claims about its benefits can not be included.

Example: Norwegian Organic Product Sectors

The whole chain agreement set up by the Norwegian authorities, which has subsidized the increase in organic production in Norway, aims for 15 per cent of Norwegian farmland to be farmed organically. However, despite a growth in organically farmed land there have not been the same developments in the growth of organic products. In every product sector, up to 50 per cent or more of organic product is being downgraded and sold at conventional prices because this surge of organic product can not be supported by consumer demand. Understanding the shortage of consumer demand in the area of organic products is complicated by an additional reluctance to actively sell products as organic by the Norwegian farmers who are growing the products and who run the large manufacturing companies under whose brand these products are marketed. One way this problem has been overcome by the manufacturers is to sell some products only as organic – for example Tine's organic Sour Milk. In this case there is no product with which this product can directly compete with and thus it can be justified to sell it as organic.

All or Nothing: Innovation within Brand and Category Management

Retailers, whether in developing new product ranges or changing sourcing policies for their categories or entire assortment, have to be able to source enough of the product to roll out their innovation. The large volumes required present a problem in a market in general undersupply (for added-value primary products). Without significant investment, supply cannot match demand. Here we see the difference between those retailers that are proactive in their approach to farm animal welfare and willing to invest in the long term for future commercial advantage.

An example of this is the increasing interest in sourcing free-range liquid egg to use within cooked products, at the minimum in the 'best' product ranges but in some cases for all products. M&S have guaranteed that all their products only use free-range eggs.

The supply for liquid free-range egg is quite limited in the UK; there is currently no surplus. Deans Foods sell liquid free-range egg to Northern foods who make M&S food and to McDonalds for all their egg-based products, such as mayonnaise. The difficulty in increasing supply in free-range liquid eggs is explained by Deans Foods:

> 'When you suddenly say "right, instead of buying cage liquid egg I am going to buy free-range liquid egg", there aren't enough free-range seconds to satisfy their market – that's already being used. So what you actually have to do is you go to free-range first quality and, of course, then the price jump is quite high, because you're going from something that is based on second quality caged to based on first quality free-range and that's a big hurdle for them to get over. And certainly in M&S that was one of the primary reasons it took them so long to convert to all free range' (Deans Foods).

This has prompted some ‘me too’ or ‘mimicking’ action from other retailers – for example, Waitrose want to follow M&S and take a similar line in their own-label ranges. Tesco has made its vegetarian ranges containing only free-range egg. The first move by M&S means that other retailers have had extra difficulty and costs converting to free-range eggs for processed products, as the market is in such a state of undersupply and most of supply is contracted to M&S.

10.2 FARMER COOPERATIVES

Farmer cooperatives have a dominant role in the supply of fresh foods in Norway, Sweden, France and Italy. Consequently, they are significant in various ways in the raising of animal welfare standards and the distribution of welfare-friendly products through the supply network. There are variations in how farmers’ cooperatives operate in the four countries listed above.

10.2.1 Norway

In Norway, where a closed market still exists, farmer cooperatives are predominant in the market with a very strong hold over the manufacture of fresh products and the supply of these branded products to the Norwegian retailers. In each product sector, there are predominant cooperatives that hold from 60–90 per cent of the market share. The consequence of so much of the market being owned by one company is that there is very little direct competition. In fact, the Norwegian authorities actively work both to avoid competition by encouraging mergers and to promote the products they choose by giving incentives behind ‘whole chain agreements’. The Norwegian authorities are manoeuvring the market towards organic, despite their being not enough consumer demand to support substantial increases in organic production growth. In future, animal welfare could be driven by this approach. Currently animal welfare is bundled into organic products and covered by the organic accreditation scheme.

10.2.2 Sweden

In Sweden, the farmer cooperatives are strong but not as strong as in Norway, because they are operating in an open market. Consequently, retailers have more power to stock non-Swedish products despite commitments to stock Swedish (the exception is the hard discounters). However, Swedish farmer cooperatives act and behave similarly to their Norwegian counterparts. Like the Norwegians, they own the large manufacturers of fresh products. In Sweden, it is the Scan brand, owned by Swedish Meats, which is in turned owned by the Swedish farmers (the Federation of Swedish Farmers or LRF), that is dominant in the fresh meat sector. Swedish retailers, such as Coop, have a contract with Swedish. Animal welfare and high quality is associated with buying Swedish, which in turn means buying from the dominant farmer cooperatives. Like Norway, Swedish farmer cooperatives also own and control the major manufacturers brands. They have successfully run a marketing campaign to ensure that the Scan brand is associated with Swedish quality. This Swedish quality in effect means additional components that are not offered as components of products from outside Sweden. Animal welfare legislation is highest in Sweden. This campaign is in the interest of Swedish farmers who have higher overall costs than those products coming in from less harsh climates, and yet they have maintained a dominant position in the Swedish retail market to date because of the associations with Swedishness. Notably, Swedish farmer cooperatives are under greater competitive pressures than the Norwegian farmers cooperatives. In both countries, animal welfare is used very little to differentiate products, the dominant quality attribute is Swedishness. Swedishness embodies notions such as particular care for the environment including animals.

10.2.3 France and Italy

The other study countries where we see farmer cooperatives having a dominance rivaling that of the retailers is in France and Italy. However, the activities of the farmer cooperatives are different here because the markets are open (unlike Norway) and the move towards an open market hasn't happened until relatively (1995) recently. Arguably, food cultures in Italy and France are very different from Scandinavia and western European countries such as the UK and the Netherlands. What stands out about the food cultures of Italy and France is the concept of terroir. This concept is important for understanding one element of how and why farmer cooperatives still are hold such power in these countries.

Territorialization

The concept of terroir, and hence territoriality, is significantly more complex than the English notion of local and locality. Whereas buying local is fast becoming a surrogate for quality in the UK irrespective of any intrinsic qualities of the 'local' in the processes of food production, the French and Italian conception of territoriality is fundamentally imbued with a sense of those intrinsic natural and cultural components that go to make distinctive food products. In the minds of many French and Italian consumers, certain regions of France are associated with 'quality' gastronomic products and 'quality' breeds. Again, the 'welfare' components of that 'quality' are held to be implicit, sometimes going beyond the need even for specific quality labelling, such as Label Rouge in France. For beef and lamb products (such as Aubrac beef in France and special breed beef in Italy like the Coop Italia beef network), this makes the commercialization of welfare-friendly production systems relatively straightforward. Not only do those extensive systems conform fairly readily to consumers' notions of animal welfare, but complying with charters and assurance schemes can involve little, if any, additionally cost. However, it is problematic for those sectors that neither have a specific regional implantation nor are able to impose animal welfare upon specific, rustic breeds types. It is these systems that require more contrived and innovative displays of distinctiveness. The Route du Lait provides one very good example of how new (an entirely artificial) territoriality has been constructed for produces in otherwise indistinct production regions. The Alta Qualita milk in Italy also provides a similar example. Free-range pig production in the Limousin, is another example where production methods (rather than spatiality) is used to create a difference. In Italy, there are production specifications from the Consortia of Parma and San Daniele; these specifications exclude certain breeds from being used in production, yet there is no mention of spatiality.

Level of Influence

Returning to producer cooperatives, it appears that where product quality is associated with territory we find that producer cooperatives can still hold significant levels of influence in the supply network. The Label Rouge scheme in France was initiated by farmer cooperatives and has included animal welfare measures. We also see the veal producers in France working to improve animal welfare together; they are seen as a way in which the industry can move together, and there is dispute and ill-feeling if some producers do their own thing and don not stick with the main group. Fragmentation among farmers leads some to think this is to the detriment of farmers overall, because it is harder for the majority to market their positive attributes if one small group has leapt ahead to market an attribute that the majority are by definition going to struggle to reach. This can both work to enhance progress on animal welfare and to hinder progress, depending upon the context in which the farmer cooperatives are operating.

It is also true that there are significant areas of both France and Italy where a rural economy is still dominant. The high numbers of independent butchers in Italy illustrate that, although slowly diminishing in number, direct links between farmers and small-scale food distributors still exist in significant numbers. Italy still has quite distinct regions where very different practices are found from the northern regions, which are affluent and urban-centred, to the south, where agriculture is still a dominant industry. All of these points help to explain why producer cooperatives are still very powerful for the food supply economies of Italy and France.

10.2.4 Manufacturer Brands

When looking at producer cooperatives across Europe, the type of relationships they have to manufacturers brands becomes noticable. In many cases, we find that producer cooperatives also control and own manufacturer brands in the fresh produce sector – notably in dairy. However, they also supply into retailer private-label brands. Their strength in the supply network when they are involved with dealing with retailers is enhanced through being part of a producer cooperative. Where farmers work together, they are able to negotiate fairer price deals since they have a hold on all produce desired by the retailer. United farmers have something that retailers really want and will give fair price for it. In the UK, where producer cooperatives do not exist at any significant level the retailers are able to push prices down. The alternative is for producer cooperatives to be set up in partnership with retailers (as discussed above).

Importantly, much of the criticism towards improving animal welfare standards is the additional costs. It is fair to say that in those countries where producer cooperatives are dominant and have product components desired by retailers – whether these are nationally grown product, or added qualities – animal welfare measures could be implemented successfully through the producer cooperatives. The problem for producer cooperatives is that it may make it increasingly more commercially difficult to market product abroad as the price will perhaps be that little bit more higher. Additionally it can be hard for farmers to find financial resources to renovate animal housing, etc.

In general, producer cooperatives can be seen to hold positive potential in increasing farm animal welfare.

10.3 MANUFACTURERS

The visibility of manufacturer brands in the market for welfare-friendly foodstuffs varied significantly across the six study countries. As is discussed previously, manufacturer brands owned by the farmer cooperatives play a major role in the market in Norway, Sweden, Italy and France. Yet, it is also true that manufacturer brands are proving successful in the UK and the Netherlands when marketing a high quality product. They are particularly successful in the dairy sector, in the UK and the Netherlands and for that across Europe. Market development in higher quality milk, cheeses and yoghurt products is led by manufacturer brands, not retailer brands, in all countries.

In the meat sector, manufacturers that carry welfare-friendly claims are less dominant (except those in Norway, Sweden and Italy, where they are owned by farmer cooperatives). The reason why they appear to dominate less in the UK, the Netherlands and France is because processed meat products – typically the product of meat manufacturers – are rarely marketed as welfare friendly. These processed meat products are one step further removed from the animal, and when it does come to marketing these products it is the organoleptic qualities that override any animal welfare claims. For this reason, there is often less attention paid to the quality of the animals life that enters the supply network for these processed meat products. The market for organically produced meat products is the exception to this rule. The organic market has expanded from the fresh product range into the processed meats and ready-meal market in the last few years. In the UK, we find an organic beef burger range that, although small, indicates the trend towards organic processed meat products. Additionally, in the UK there is a sophisticated market for quality sausages and bacon. This is an area that both the retailer private-label ranges and manufacturer brands have worked on. The pork sausages and bacon in these quality ranges are found to carry frequently some commentary about the animal's life.

When we consider large multinational manufacturing companies such as Masterfoods and Heinz, however, we find that there is no mention of animal welfare on any of their products. The success of their brands is imbued in the quality recognized in their product, marketing these products along lines more associated with lifestyle than with what actually goes into the products. It is beyond the scope of this study to know whether farm assurance is something that is sorted by these suppliers. In contrast, in the UK there is a very small company that works under the brand Duchy that puts its name to a range of high quality products where the quality of the meat and the life of the animal is very much what they want to talk about, along with organoleptic qualities.

If we consider the large Norwegian manufacturers, we rarely find any commentary about animal welfare. This is because it is in their interest to market the product along lines of product quality post-slaughter, rather than pre-slaughter. The reason behind this is connected to the notion of equivalence, which is very strong in Norwegian culture. There is no wish for farmers to compete with each other on quality; instead, everything should be of a similar quality. Thus, it would be almost unheard of for a Norwegian product to carry marketing claims that state in detail why this production system is better than that. Similarly, the organic market in Norway carries very little additionally marketing information except that the product is organic. The exception to this low-level marketing approach are those products that are healthier for the consumer. It appears to be appropriate for products to be available in the market-place to have clear messages about being healthier for you. This does not draw any animal welfare implications on the company that has manufactured the product, nor the farmers that have produced the product.

11

THE PRODUCT SECTOR

11.1 PAN-EUROPEAN DAIRY SECTOR ANALYSIS FOR WELFARE-FRIENDLY PRODUCTS

The development in dairy products that carry animal welfare claims varies across Europe – we seek to understand that variation in the context of different regulatory and commercial structures between farmers, manufacturers and retailers across the six study countries. There are examples of milk, yoghurt and cheese products carrying animal welfare claims. The quality-driven market is relatively well-established in some countries in the organic yoghurt market and is characteristic of cheese production across Europe (yet the inclusion of animal welfare as a quality indicator is rarely found on cheese). Conventional milk production now competes alongside organic milk production for claims on quality. However, there are examples where conventional milk production is making claims about animal welfare. We will discuss examples that map out these variations. Generally, across the five product sectors there were less dairy products that carried welfare claims than say egg products or in some countries pig products (see Roe and Marsden, 2007). In this section, the aim is to explain how the dairy sector across Europe is developing welfare-friendlier production methods and how, why and when these are used as marketing claims.

11.1.1 Dairy and Beef Sector Overlap

It is important to remember that when discussing the dairy sector in most countries across Europe this is simultaneously connected to the beef sector, as older animals enter the beef supply network.

> 'When one talks about the death of a dairy cow with dairy farmers, it is something they avoid. When you get to know them, one can see that sending a dairy cow off to the abattoir is a difficult moment for the farmers and it is avoided. Although half of the beef consumed in France comes from dairy herds, the dairy farmers do not see themselves as forming part of the meat profession and therefore have a very different relationship with the abattoirs' (French Milk Union representative).

The obfuscation works both ways. Abattoirs and meat processors rarely make it explicit (or even mention) that a significant proportion of their meat actually comes from ex-dairy herd animals, this despite the fact that such animals may well have benefited from appreciably higher welfare conditions than beef cattle.

Second, it is held that the relationship of the farmer to the dairy animals is significantly different.

> 'The farmer who milks his cows twice a day has absolutely no reason to mistreat them, usually between 40 and 80 of them. He will know them all individually, their name and their number. This is a traditional relationship and this is the main reason why it doesn't surprise us at all that [animal welfare] legislation is primarily directed towards the poultry and the pork sectors' (French Milk Union representative).

The exception has been the UK where restrictions following the BSE crisis led to the Over Thirty Month Rule. This ban was lifted in January 2006. However, there are examples, despite this restriction having been lifted, that the industry in the UK has not in all ways responded to these changes – where older dairy cattle could be used beef cattle still dominate. The beef supply industry will be discussed separately.

11.1.2 Quality Drivers and Organization in the Dairy Sector

The dairy sector across Europe has experienced most change following the development in the organic standards. Organic dairy products have been particularly successfully marketed as the industrialization of conventional diary production has attracted concern. Consequently, there has been significant innovation in this sector. In the six study countries, the organic dairy sector is a significant area where animal welfare claims are being used on product packaging.

In Norway, Sweden, France, Italy and the UK, we find dairy cooperatives in strong positions. The strength in their position is greater where they also 'own' or 'run' the milk processing companies that sell dairy products to retailers and where at a national level there are fewer of them enabling market control. In Norway, Sweden, France and Italy, these cooperatives are found across the conventional and organic sectors. In the UK, they are only found in the organic sector and have a significant, but by no means as powerful, role in the milk processing sector as is found in the other countries. The organization of these cooperatives varies from a strong local/regional cooperative structure that feeds into the larger national structures or depending on the size and nature of the country larger national cooperatives. In France, for example, the cooperatives are regionally based, as they are in the UK organic sector, where the Organic Milk Supply Cooperative is predominant in the South West. By contrast, in Sweden and Norway the cooperatives have a strong nationwide grip on the market and do not have a regional collective strength. There is strong representative power of dairy farmers through these cooperatives when they own the milk processing and milk distribution network, because they are then in a powerful negotiating position with retailers. In Norway and Sweden, we see this national structure, whereas in France and Italy we see a regional structure, but in both contexts the farmers cooperatives are involved in the commercial sale of products through ownership or holding a share in a cooperatively governed manufacturer and processor. Where this structure is in place we see the quality component of milk worked up the supply network from the producers. Animal welfare can become more easily one of these qualities in the conventional and organic dairy sector when organized around cooperatives. In the conventional sector in the UK, where the cooperative structure has disappeared, it is the large milk processors like Arla and Dairy Crest who are the innovators, and they are doing this through how they process milk not how they produce milk. Arla currently have a high profile advertising campaign for their Cravendale milk, which they sell as 'purer' than other milk. The process of purification comes through an industrial process and has nothing to do with on farm practices.

11.1.3 Product Example: Grandlait from France

This product illustrates how farmer cooperatives have successfully worked to produce a quality milk product using conventional farming approaches. It is illustrative of how products are developed within structures similar to those in Italy, Norway and Sweden.

In France, there is a product called Grandlait milk, which makes specific claims with respect to animal welfare. The product is produced by 'Candia', the dairy cooperative, now part of the major agro-industrial group Sodiaal – the sixth largest dairy cooperative in Europe organized into 7 regional groups (with a total annual production of over 2 billion litres each year and an annual turnover of in excess of $3 billion). It represents around 10 per cent of milk produced in France. The 'Route du Lait' is a voluntary quality assurance scheme established by Candia and launched in 1998; the accompanying Grandlait product brand was launched in 2002. The Route du Lait assurance scheme goes significantly beyond basic legislative and regulatory imperatives as well as the more common good practice codes operated by the industry. To date, some 9000 farmers are contracted under the Route du Lait. However, there are additional criteria for those 4500 diary farmers that supply into the Grandlait supply network. The milk for Grandlait is kept separately from the collection of other milk. The philosophy behind Grandlait, like Route du Lait, can be summed up by the slogan on their website: 'Well fed and well treated: our cows give better milk'.

The drive behind the Route du Lait and Grandlait has been an answer to the following two questions. First, how to communicate to consumers more about how milk is produced. Second, how to develop a new system of quality assurance.

Agroconfiance, a certification body, has been an important quality reference for cooperative structures since it has been the basis for 'a more egalitarian trade between

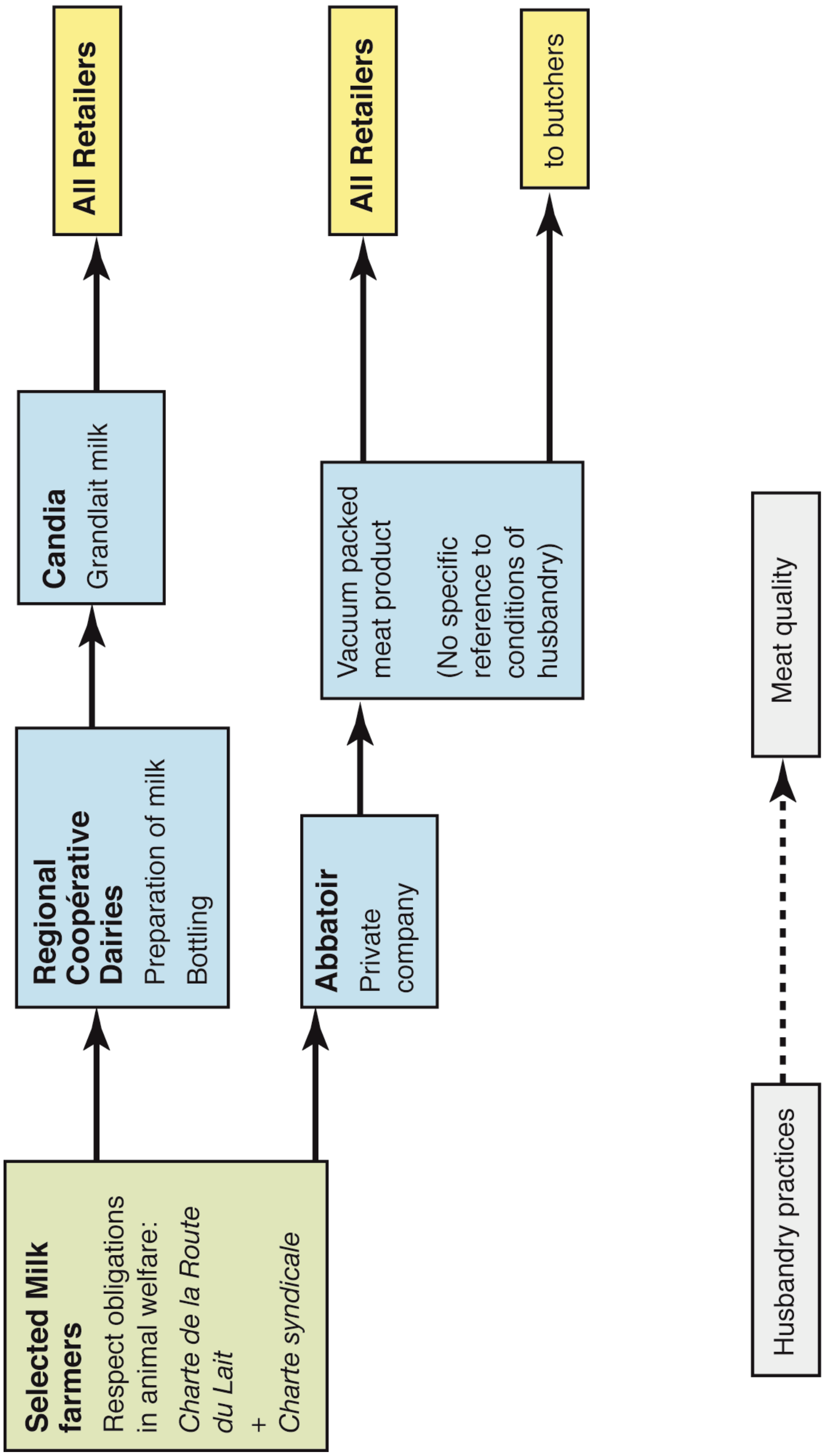

FIGURE 11.1 Grand Lait retail distribution and supply network.

national producers and distributors'. Self-assessment forms an important part of the assurance process. For farmers supplying into Route du Lait, there needs to be an intention to meet the quality control standards. Whereas for those farmers supplying into Grandlait supply network, they have to be fully integrated into the quality control requirements and thus classified as 2, 3, or 4 farms.

It is interesting to consider why it is possible for specific animal welfare elements to be added to the production process to offer a distinct component to product differentiation. The Sodiaal cooperative is distinctive in France because it brings together dairy farmers that lie outside of the more well-known dairy regions of France. As a result of this lack of concentrated sourcing, the farmers concerned are often less intensive and smaller than those found in the more dedicated dairy areas such as the western departments. This has arguably made it easier to introduce specific animal welfare elements into the production process as a distinct component of product differentiation. This cooperative group does not engage with the supermarkets. It prefers not to confuse the image of the dairy farmer so as to strengthen their negotiating position over prices. In contrast to this position in France, the major Swedish and Norwegian dairy farmer cooperatives are in a very strong position, controlling 90 per cent of their markets. Consequently, they do not fear negotiations with supermarkets, like these French farmer cooperatives do.

In Italy, we also see milk processors/manufacturers and cooperatives taking the initiative. This is similar to Norway and Sweden, where there is a unique partnership between the farmers and the manufacturers. The difference is that in Norway and Sweden, the dairy sector is heavily dominated by one company, whereas in Italy and France there are two or three significant players. The Italian product 'Alta Qualiti' (high quality) milk is produced by Granarolo and includes animal welfare criteria. Granarolo is responsible for producing and selling the group's consumer products. It is owned by Granlatte, a milk-producing agricultural cooperative that owns Granarolo. The high quality milk has been produced since 1992. It follows strict production specifications laid down by Italian law concerning not only production and commercial parameters but also animal welfare parameters (the selection and state of health of the cattle, feed, stable hygiene and milking procedures). The marketing of the milk is focused on inputting chain values, naturalness, health and its Italian origin. However, together with Granlatte, Granarolo have not only set standards at farm level, they have taken an integrated approach to quality policies, setting economic, environmental and ethical objectives through the whole food network.

It is worth making a particular point about the Norwegian dairy sector. It is dominated by Tine, who hold 93 per cent of the market share. However, what is interesting is how the 'whole chain agreement' between farmers and the Norwegian authorities is working to increase organic production and what the consequences have been on the market. Currently, 48 per cent of organic milk is sold as organic and 51 per cent of organic milk is sold as conventional. Since 2001, there have been increases in demand for liquid organic milk, yet demand for the further refinement of organic milk has not increased accordingly across the Tine range – for example, organic semi-skimmed milk, organic Norvegia milk, organic Novegian cheese, organic fruit yoghurts, organic sour cream and organic Kefir (sour milk). An initiative by Tine to increase interest in these more processed products has been the introduction of a new brand concept, 'Osteocompagniet', in 2003, with the aim to put speciality cheese and other niche products in focus. It is taste, region and animal welfare that feature in this marketing. The Tine organic range is also promoted as an independent brand, yet with similar packaging across all ranges. However, a problem that has been faced by Tine in relation to marketing animal welfare is how the cooperative model works to hamper attempts to segment product lines based on quality because it suggests conventional is worse. This explains why Tine is mainstreaming organic milk with an implicit value of being welfare friendly and without communication that it is better or more animal welfare friendly. Yet generally, dairy farmers in Norway are moving into organic for commercial reasons and consumer interest to buy organic, despite resistance in developing the organic market by breeding organizations and sales cooperatives. This resistance amounts to a failure to meet the interests of both farmers and consumers, it and works against the authorities who see the political, economic and symbolic significance in driving for increased organic production in Norway. This story is not only relevant for the dairy sector in Norway but a tendency more widely found in the country. Yet through this illustration, it indicates some of the complications that the cooperative model can harbour in developing segmentation in the market along issues of production quality. One can perhaps understand why putting in quality at the level of processing is a way to obviate the potential dis-ease around production-based qualities where one cooperative company dominates.

11.1.4 Conclusion

In conclusion, the inclusion of animal welfare parameters to innovate speciality dairy products is more often driven by the farmers who are a member of the dairy cooperatives being involved in driving production quality within the supply network from the bottom upwards. Where dairy farmers have little influence, quality is being driven by processing techniques. In the dairy sector across Europe, the success in developing welfare improvements can be attributed to how the sector is organized. The costs for welfare improvements are kept with the farmers when they are initiated by the farming base. Manufactured dairy products are being developed that contain higher welfare standards; within the cooperative structure, there should be little reason why these will not be successful if they are built upon well-recognized brands.

Dairy cattle are imagined by consumers to be outdoors grazing on grass. In those countries where there is heightened suspicion about the realities of industrialized farming, we find more success in promoting higher quality, conventionally produced dairy product or organic dairy products.

11.2 PAN-EUROPEAN BEEF SECTOR ANALYSIS FOR WELFARE-FRIENDLY PRODUCTS

There is a lot of movement in the beef sector in Europe between countries. For example, Coop Italia, one of the leading Italian retailers, has special production requirements for their beef (they handle 25 per cent of Italian meat supplies); however, 47 per cent of the animals are sourced from outside Italy. The movement within the beef sector is because of the different stages of the beef animal's life. The animal is born on a farm, and maybe moved to another farm up until 16 weeks until it is weaned, then moved to at least one, two or maybe more other farms for fattening before it eventually reaches the slaughterhouse. As was discussed about the dairy sector, old dairy cattle are also entering the beef supply network, which is very rarely discussed. When it comes to discussing the welfare of beef cattle and getting some guarantee that certain production standards have been met, this becomes an additional challenge when dealing with a sector where there is little integration and a lot of movement of cattle between farmers. Traceablity to ensure compliance with tighter regulations does not appear to be in place yet to ensure whole life assurance for beef cattle. This is an issue that the UK farm animal welfare council has picked up upon but for which there is still no mechanism in place to ensure whole life assurance.

There is less use of animal welfare-friendly claims on beef products compared to other sectors. Unlike hens, chickens and pigs, there is no attempt to develop a new production classification to differentiate poorer welfare conditions from better ones – such as free range or barn reared. However, there is the use of the term 'grass-fed', which conjures up an assumption that the animals are outdoor living, although most consumers would naively assume that this is always the case and do not recognize the climate issues that result in outdoor access in some countries being restricted to the summer months (depending on the breed and hardiness of the animal).

The beef industry is not structured through cooperatives to the same extent this is in the dairy sector. Having said that, they are particularly powerful in Scandinavian countries. In Sweden, Swedish Meats, owned by the Federation of Swedish farmers (refered to as LRF), supplies 80–90 percent of all beef sold in Swedish retailers. The brand is Scan. All LRF farmers are audited both to Eurepgap and to Swedish legal standards. In Norway, Gilde are the largest organic livestock producer and they occupy 50 per cent of the beef market. Currently, only 25 per cent of organic products are sold as organic, the rest goes into conventional production. The commercial affordability of this amount of downgrading is because the initiative to increase organic production is supported by the Norwegian authorities 'whole chain agreement', yet it is also recognized that it is a major hindrance to the growth of the organic meat market.

For conventional beef produced by Gilde there are no additional welfare standards; they feel their standards are 'good enough'. However, Gilde communicate animal welfare on products through the phrase 'natural behaviour and needs'.

Breeds are particular important in the beef sector, both in terms of developing gustatory quality products from quality breeds and also because they provide an important quality marketing tool. An example of the effective use of breed and how animal welfare has been incorporated into the breed brand values is Aberdeen Angus beef. It is a recognizable brand in the UK and used by the retailers in their top quality beef product ranges. Scotbeef are one of the biggest suppliers of Scottish beef and specialize in Aberdeen Angus. All of their farms have at least Quality Meat Scotland or Assured Food Standards certification. Following interest from one of the major retailers, M&S, Scotbeef have put in a lot of effort into breeding beef cattle selectively to improve taste and meat consistency; this system of selection is called BeefTrack. This has included selecting forage-based farms, where natural products rather than barley concentrate is fed to the cattle, rather than intensive care farms. They also looked at the age of the animal. Now M&S Aberdeen Angus beef products all come from a number of select farms that are audited to M&S standards – these mainly cover (over and above the national schemes) feed (no GM), the holding times on farms, breed and carcass specification. They point out that one of the big differences between themselves and the rest of the industry in Scotland is that they do not slaughter to sell meat, but slaughter to put retail packs on the counter; hence, they are a much more integrated production business. Therefore, Scotbeef have the responsibility for balancing the carcass as well as primary processing; a site of intense innovation. Scotbeef have three sites for secondary processing, allowing them to utilize the popular cuts and add value to the carcass. On the fresh cuts side, they also supply meat to a range of other retailers, including Sainsburys and Coop. On the processed meat side, they provide products to Coop, McDonalds and Heinz and other food service outlets. In the UK beef industry, the abattoirs often need to find suitable partnerships between clients.

The position of abattoirs in the European beef industry does vary. They do not all take on board the commercial challenge of balancing the carcass. There are some retailers who will buy the whole animal and carry that commercial responsibility themselves – in the UK, the quality retailer Waitrose and the middle-range retailer Morrisons perform this role.

11.2.1 Product Examples

All of Coop-branded beef comes from Coop-controlled supply networks. Farms are selected according to farming methods that respect the environment, animal welfare and assure high hygiene standards. Wholesalers importing beef from France sign contracts to ensure they only sell animals that comply with Coop specifications. The chain is audited by Coop and CSQA and controls 310,000 heads per year. Supplies also sign an ethical code of conduct. Commercial relations between operators in the network and consumers must, therefore, respect ethical behaviour and transparent, collaborative management in all operational phases. The animal welfare requirements focus on behavioural, physiological, pathological and production indicators on the farms for a targeted approach for the concrete implementation of animal welfare standards with a view to the ethics and the improvement of quality and safety of the finished product.

Another product example is Greenfields Beef sold in Albert Heijn in the Netherlands.

Albert Heijn have set up the private label Greenfields Irish-bred beef to support this product. Ireland has the image of a country with a widespread green landscape. Greenfields captures this image in their beef products. Setting up a supply network itself has the advantage that management is in your own hands. It is an open system where farmers can join if they meet specifc criteria. Producers are obliged to work according to certain quality schemes. For Northern Ireland, these are the requirements of the Beef and Lamb Quality Assurance Scheme, operated by the Meat and Livestock Commission in the UK (which is part of the UK Assured Food Standards scheme). In the Republic of Ireland, the quality demands follow the Beef Quality Assurance scheme. Both schemes conform to international norms (EN45011) and are equal to one another. Albert Heijn launched a website for consumer information, which looks at the Greenfields products in more depth. The five freedoms are mentioned as the basic requirements. Other issues that are handled are: traceability, animal health, feeding, animal treatment, environment and transport. On the website of Albert Heijn, the Association for the Protection of Animals compliments Albert Heijn for its Greenfields beef, as it almost meets the requirements for 'scharrel' meat (free-range) and approaches organic norms.

Although Albert Heijn has a specific scheme for Irish beef, other retailers in the Netherlands like Laurus and Jumbo also sell Irish beef. They also state that welfare conditions are better in Ireland, but quality in general is the reason to sell Irish beef. Dutch beef originates mainly from old milking cows.

The assurance scheme that Albert Heijn uses is the UK industry standard. This example illustrates how Irish beef from both the Republic and Northern Ireland has successfully marketed itself as something special (importantly, it has not been associated with the British beef BSE scandal). Additionally, this illustrates how variations in scheme standards across Europe, here between Ireland and the Netherlands, allows the possibility to innovate within the beef sector.

11.2.2 Relationships between Dairy and Beef Sectors

The French team has identified some recognition for the higher welfare that cattle experience whilst reared for milk as opposed to beef, by a price premium that farmers receive when they take dairy cattle from Route du Lait accredited farmers to regional abattoirs. However, it is clear that this accreditation is not referred to or used in the subsequent marketing of the meat.

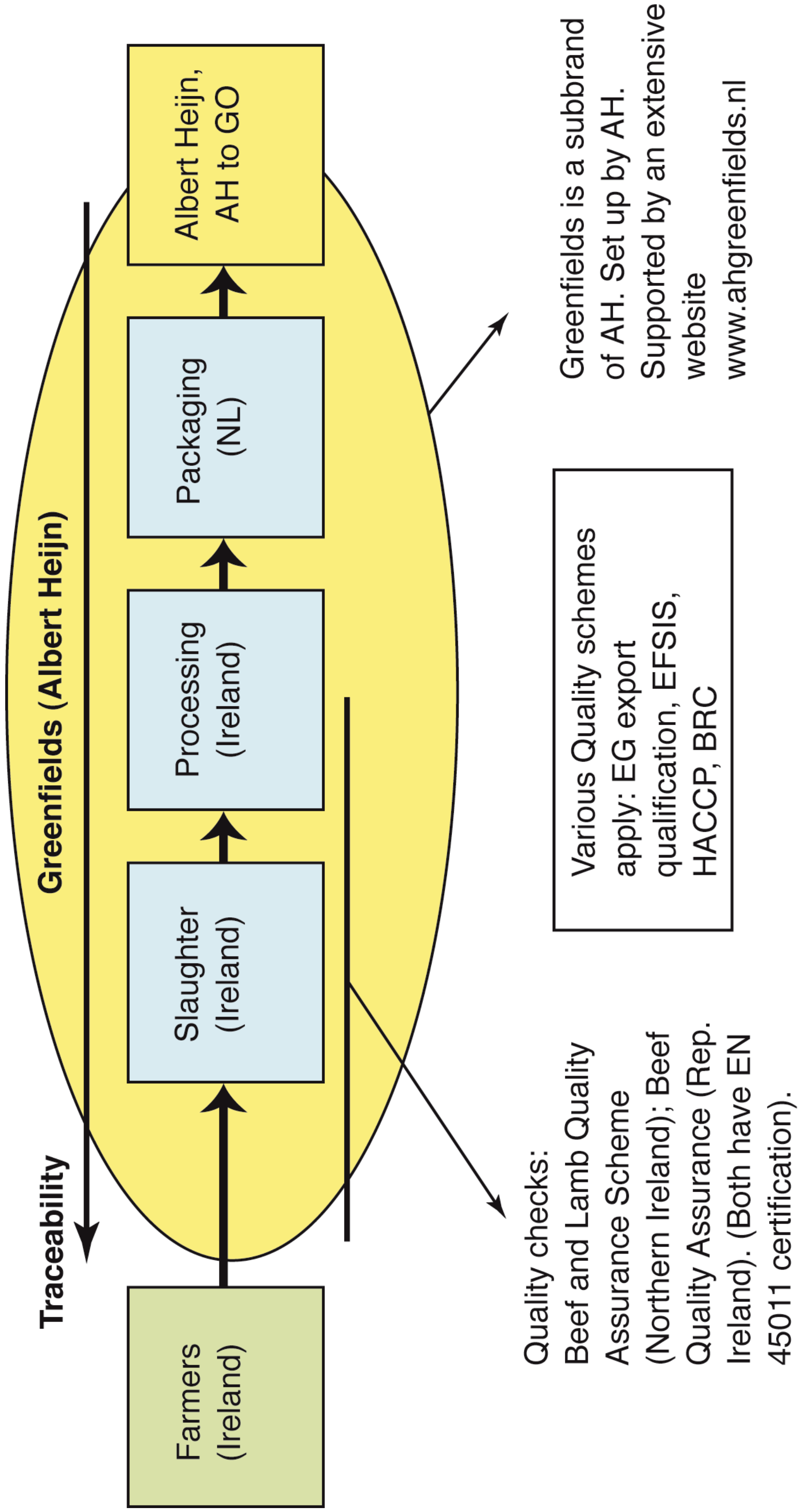

FIGURE 11.2 Greenfields beef supply chain.

> 'We have not referred to the Route du Lait in our communication and marketing, nor have we referred to animal welfare beyond our website. Even then, we only really mention good practice. The term 'welfare' as used by everyone is not necessarily the best term for us in the transformation sector when it involves the slaughter of animals. We might talk of eliminating bad welfare but not about attaining good welfare. From an ethical point of view and perhaps for our engagement to overall product quality and the image for our consumers, but no more than this, the sense of a global quality of the product. The perception of the consumers, and the way this is interpreted by journalists, is to portray us as the bad guys, the least respectable actors in the chain' (manager, French abattoir).

The signature product of this abattoir, drawing on the Route du Lait dairy cows and sold in virtually all French supermarkets, is a range of vacuum-packed, long-life meat cuts. For the abattoir/manufacturer, the treatment of the animals on the farm is a key element in the success of their product.

> 'Our principle product can only really be made from meat of a high quality. This comes from mastering the quality effectively. Colour, tenderness and conservation are the characteristics of the brand and avoiding any mistreatment of the animal or any poor health is a component of the quality. We use the pH standard recommended by all. The regularity of our suppliers with their particular standards is very important to us. We have an indicator of how many times we go above the pH and this is also an indicator of the mistreatment of animals' (manager, French abattoir).

11.2.3 Veal

The veal industry is emblematic of animal welfare concerns. The transport of young veal calves and the conditions of their confinement during growth have long been the focal point of welfarist attention and in certain countries, notably the UK, low levels of veal consumption have been linked directly to consumer concerns over husbandry methods. In France, veal production, though declining in terms of volumes of meat sold, is still an important agricultural sector, one that is, for the most part, highly vertically integrated. Furthermore, French veal production operates in close association with the French dairy industry, as the bulk of veal producers take their male calves in from dairy herds. All this being said, veal production in France and the Netherlands has undergone substantial change as a result of increasingly strict hygiene and welfare regulations. In terms of animal welfare, it is now one of the most regulated sectors of the market.

In France, the veal network for animals under six months (the standard age limit for veal calves) is divided into two distinct sub-networks and, therefore, products that are differentiated principally by the production methods and the feed used. On the one hand, there are veal calves raised on a feed derived largely from milk powders (known as 'butchers veal'). On the other hand, there are the veal calves fed on their 'mothers' milk, known as 'veau sous la mere'. Both types produce a characteristically white meat. White veal meat (which used to be called 'Parisian veal') still constitutes the centrepiece of the French veal industry. However, a second form, known as 'rose veal' also exists on the market. This veal, produced from calves slaughtered between 6 and 10 months and also known as 'heavy veal', is derived from calves fed on cereals as well as milk products. Meat derived from male calves older than the requisite age limit is referred to on the market as young male cattle meat and is often sold as such (though it commands significantly lower prices than veal).

Veal production in France is generally governed by an industry assurance standard (CCP) and/or distinct Label Rouge certification. Around 28 per cent of all veal produced in France falls under the CCP, around 5 per cent comes under Label Rouge and the rest (65 per cent) is conventional production complying with legal standards only. It is a particularly concentrated sector within France, with around 90 per cent of the national production coming from 10 major actors in the network. One particular industrial group accounts for 60 per cent of French veal production.

Animal welfare is seen as being included in the assurance scheme. The industry does not want animal welfare to be a distinctive criteria 'because it is a baseline that all must respect. Nevertheless, some products mention it and others don't' (veal manufacturer).

In the Netherlands, Peter's Farm veal, owned by the Alpuro group, does make specific animal welfare claims. The Peter's Farm range of veal was introduced by Albert Heijn. However, the specific welfare claims have been hard to maintain as biologists and ethologists have had contradicting interpretations of animal welfare. The concept of Peter's

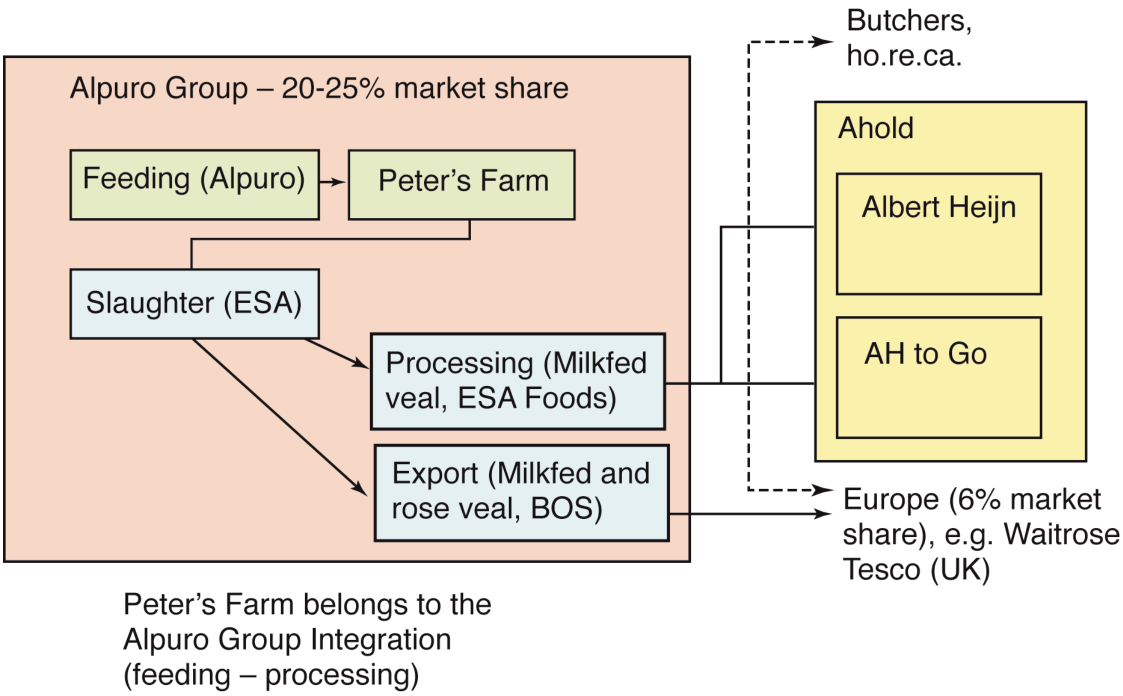

FIGURE 11.3 Peter's Farm veal retail distribution and supply network.

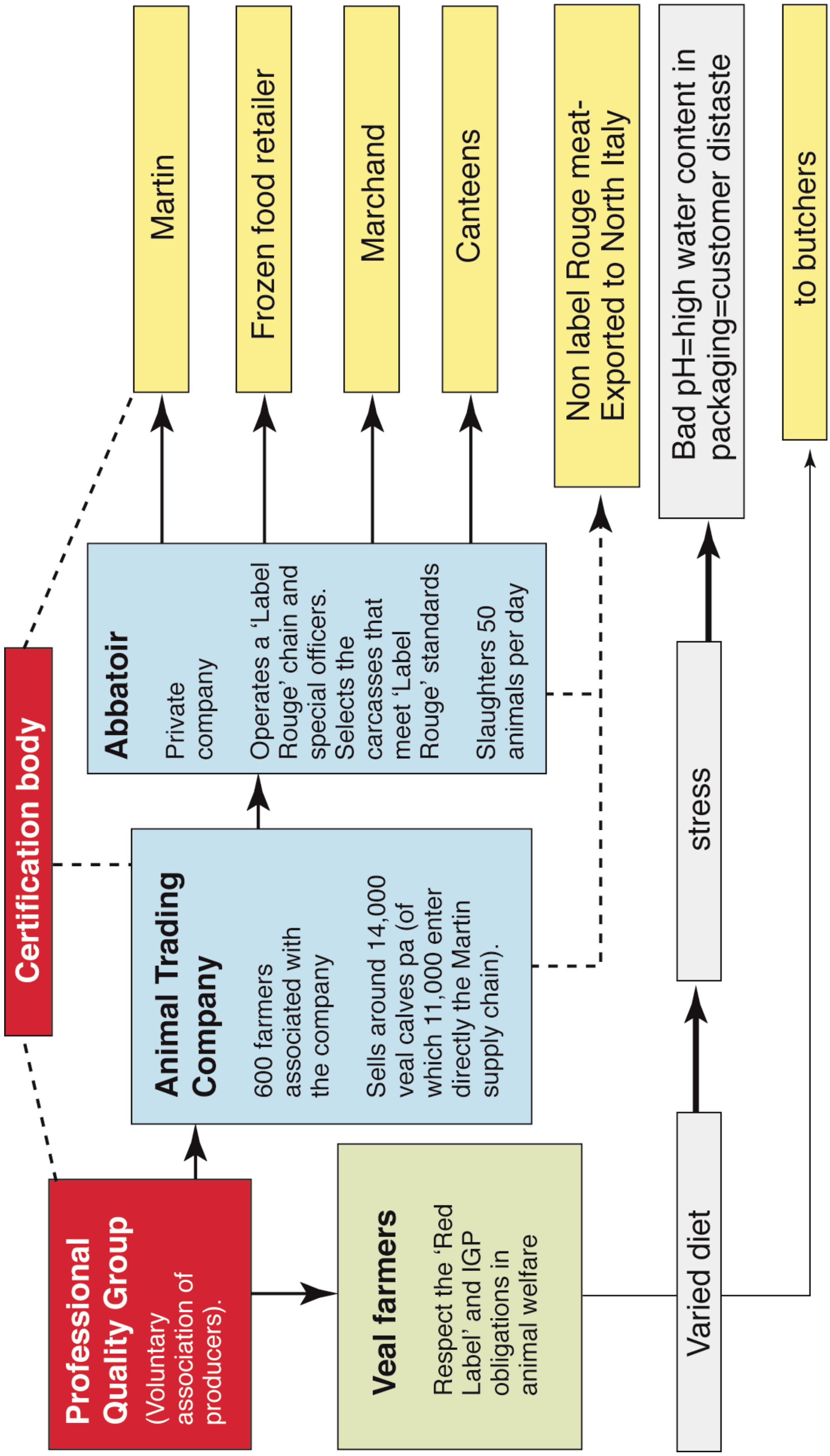

FIGURE 11.4 Averyon veal retail distribution and supply network.

Farm was founded in 1997 as a new concept within Alpuro. At Peter's Farm, calves are housed in groups of about 60 calves. This is much larger than in 'conventional' farms with group housing and, therefore, the calves have more freedom of movement. In addition, calves in a Peter's Farm farm are offered distinctive 'toys' to prevent them from sucking each other. The minimum (indoor) free-range area per animal is 1.8 m^2 (legal minimum is 1.5–1.8 depending on the weight of the calf). Finally, the minimum weaning age is 10 days, and the minimum slaughter age is 24 weeks. About 40 farms are connected to Peter's Farm. In its communication, Peter's Farm focuses on 5 issues: quality, animal welfare, traceability, security and open information. The supply network for veal is highly integrated: feeding, breeding and processing are done within the Alpuro network. The advantage of fully integrated supply chains is that innovations are relatively easy to implement and accordingly, welfare monitoring and/or improved welfare standards can be implemented top-down from stable to the final packaging.

11.2.4 Beef Conclusions

Despite the lack of recognized marketing slogans used to sell beef or veal as welfare friendly, there are movements towards including animal welfare in beef and veal marketing. This is in place to differentiate the market and is bundled in with taste and breed indicators that have a higher marketability than animal welfare. These approaches are more often found as innovations of retailers and are less associated with producer-led initiatives in this sector.

Veal is a product that some retailers hesitate about bringing into their private-label ranges, because of the controversy surrounding the welfare of veal calves. This does not stop them from stocking it when under another brand. For example, Waitrose in the UK do stock Peter's Farm veal but they do not market it under the Waitrose own label, because they let them ad lib on water and thus the calves fill their stomachs with water. For this reason, they will not sell Peter's Farm veal under their own abel. Private label ranges are carefully considered, because it is a retailer's brand being directly associated with a product type – in this case, this veal product does not meet the brand values of Waitrose.

11.3 POULTRY SECTOR

The profile of the welfare of chickens and hens has been raised through campaigns by animal welfare NGOs around caged hens and broiler chickens. Consequently, the public conscience around animal welfare has focused primarily around hens and chickens (more so the hens than the chickens). The profile of both of these animal products has also been raised by the ease with which a marketing slogan has been identified and defined that sells welfare-friendly products: that slogan being ‘free range’. The slogan ‘free range’ is used to sell both hen eggs and chicken meat. In this section the focus is upon chicken meat.

11.3.1 Broiler Chickens

The market development of welfare-friendlier chicken meat has not taken off to the same extent as welfare-friendlier eggs. Yet it is a significant growth area within the meat sector. For example, in Norway, where currently they consume only half as much poultry as in neighbouring countries, there is an expectation of an upswing in consumer demand. Generally across Europe, the development of quality poultry ranges is an attractive category in which to invest. Broadly speaking, the poultry market is differentiated along some or all of the following quality attributes: chicken breed; slow-growing, traditional production approaches; free-range; and organic. Thus we see higher welfare chickens in every country we studied – the Liveche in Norway, the slower-growing Boerenkip in the Netherlands, the Freedom Food corn-fed chicken in UK, the Amadori ‘Il Campese’ free-range chicken in Italy, the organic Bosarpkyckling chicken in Sweden and the ‘Poulet Noir Fermier’ chicken in France. These chickens illustrate the diversity in the approach for marketing and selling higher welfare birds. Some of these products have birds still housed indoors but with better welfare – for example, Freedom Food (UK), Boerenkip (NL) and Liveche (NO) bird, whereas others are organic free-ranging birds, such as the French and Swedish birds. The Italian bird is free range but not organic.

The poultry industry operates across all countries one of the most integrated supply networks. The short lifespan of the chicken has enabled companies to slaughter, process and package poultry on one site.

11.3.2 Slower-growing Birds in the Market

As discussed above, there are examples in many countries of the slower-growing chicken with more space requirements (whether free range or not). The ‘Boerenkip’ product from the Netherlands is discussed in more detail. This chicken has been developed through a partnership between the Dutch Association for the Protection of Animals, the Southern Agriculture and Horticulture Organization (ZLTO) and Coppens Animal Feeding. By the end of 2006, the product was due to be available in three supermarket chains. The Dutch association for the Protection of Animals has been actively involved in setting the standards and supporting the product. This is a similar model to the RSPCA-supported Freedom Food chicken product available in the UK. This product is positioned price-wise between regular and organic chicken, The Hubbard chicken species has been chosen because it is ‘robust’.

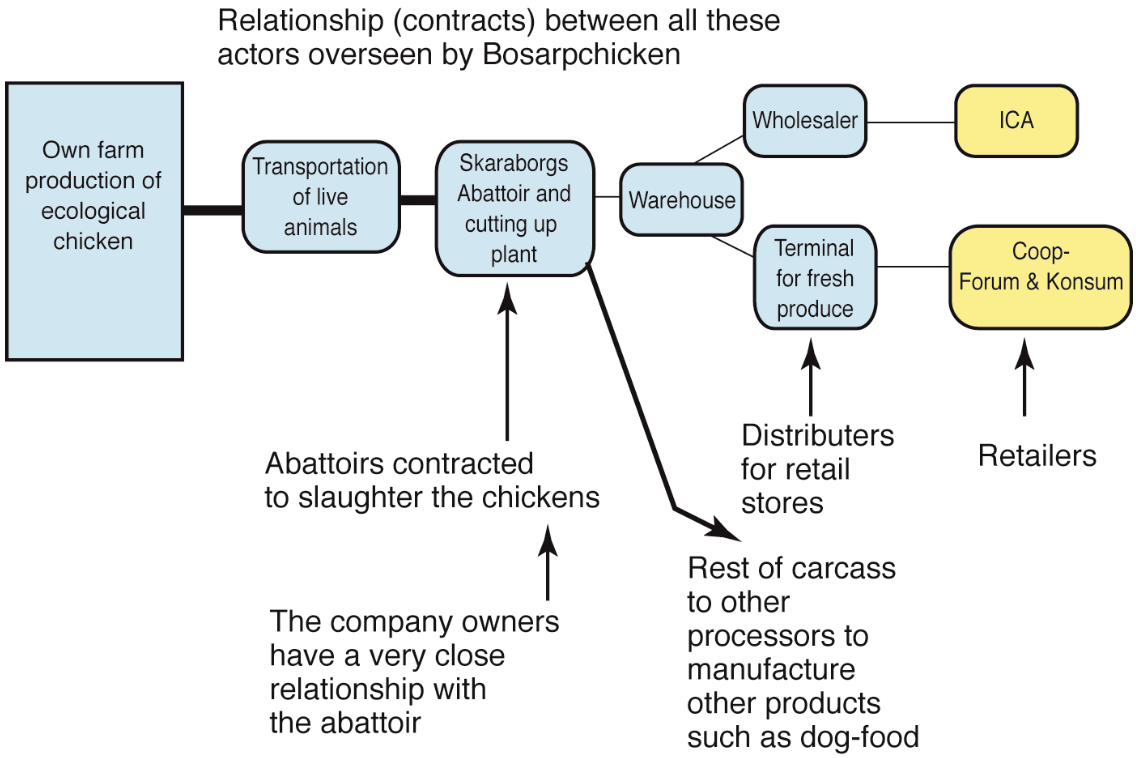

FIGURE 11.5 Bosarpchicken retail distribution and supply network.

The developers of the UK chicken product, which aims for a similar market niche, have developed this product line as a corn-fed bird because it offers a different product colour on the shelf to make it distinctive from other products.

Returning to the Dutch bird, its additional features are:

- breeding 57 days (instead of 6 weeks);
- covered outdoor access;
- maximum of 38kg/m^2 (instead of 25 hens per m^2);
- feeding with additional grains (Anonymous, 2006b).

Advantages of this bird have been lower losses. In the regular poultry sector, losses are about 3.5–4 per cent, whereas in this bird it is 2 per cent. Problems with the heart hardly occurred and chickens stand stronger on their legs. The supermarkets guarantee to buy 10,000 hens per week in the first year at a 20 per cent premium to cover for additional costs. The supermarkets aim for a 10–15 per cent market share.

What has driven the development in the chicken industry towards innovating higher quality birds across Europe? One of the primary motivations is the price pressures placed on the standard broiler bird. Consequently, it is getting harder for European poultry farmers to compete with Brazilian and South-East Asian poultry farmers on these products. Therefore, diversification by some farmers into breeding and growing birds to additional quality standards including animal welfare is a response to these pressures. For the retailers, there is scope to put these higher quality products in their private-label ranges, which adds to quality bundling, thus differentiating one product tier from another.

11.3.3 Chicken Product Variety for Higher Specification Birds

An area that is difficult to manage as one works up the added-value production is how to manage carcass balance. In many cases, these added-value birds are only available as whole birds for special occasions and are not seen as everyday purchases. Selling the birds whole successfully overcomes some of the difficulties in finding a market for the brown meat parts of the bird. Within the retailer private-label categories, there has been a development to broaden out the offer of higher quality poultry products as a way to tackle the carcass balance problems. In Italy, for example, the Il Campese chicken is available as leg, body, breast and drumsticks.

The Il Campese chicken developed by Amadori follows the production logic of 'total quality'; thus it applies stricter regulations and protocols than those generally applicable to animal welfare. The animals are carefully selected from special breeds (with reddish plumage to give straw-coloured meat, longer and thinner thighs, a leaner and more pointed breast). Direct control of the health and hygiene conditions of the animals is carried out at the breeding farms. The animal feed comes exclusively from Amadori feed mills, and consists of cereals and mineral salts. The feed also contains no animal-based ingredients. The birds are fed mainly on cereals (70 per cent) that respect the European GM standards forseen for human foodstuffs (EC Reg. 49/00). Growth-promoting antibiotics are not used. For each period of the year or age of the animal, expert nutritionists define the best mix of cereals and mineral salts for a balanced diet that guarantees the health and well-being of the animals. The birds are raised outdoors. The farmers are located in the Tavogliere delle Puglie, in areas away from smog, dust and other sources of pollution. The farms have large fenced areas in which hens are free to roam and scratch about. There is approximately 30,000 m^2 of space in which to farm. At dawn the hens are let out, and they return to the shed at dusk.

What marks out the poultry industries involvement and interest in animal welfare from other sectors is that it has found it commercially advantageous to use animal welfare explicitly in their marketing and differentiation. Defining a different production system (such as free range as opposed to conventional) has offered a lot of scope for industry development. However, although comparisons can be drawn with the egg industry, the egg industry does not have to deal with issues of carcass balance. Thus, although there are many incentives to develop higher specification birds since profit margins are potentially higher, this reaches a ceiling when the market for whole birds dries up, and pursuing this type of bird in the chicken sections market is a much more complex strategy. Currently, there is a lot of downgrading of higher value chicken parts into conventional.

The other strategy that is used within the conventional market, but of which it is less clear whether it can be a strategy for higher value birds, is the opportunity to export chicken parts unpopular in one country to a country where they are popular. For example, in Europe it is white meat that is popular whereas in Japan it is dark meat. In Europe, the beaks and the feet of chickens do not find a market place as easily as they do in China and South Africa. The size and scale of the chicken producing enterprise must be appreciated to get some sense of how it can be commercially viable to send crates of chicken parts to other parts of the world. The question is: can the value-added market benefit from this market place or are these practices only commercially viable for the standard bird, or will only a standard price be given for chicken parts that enter this international trade?

11.4 PORK SECTOR

11.4.1 Regulation

National legislation regarding the keeping and slaughter of pigs varies widely across the study countries. In the simplest terms, Sweden, Norway and the UK are characterized by tighter legislation, mainly around stocking densities, use of farrowing crates, castration, etc. France, Italy and Hungary have a much looser national interpretation of EU legislation. The Netherlands sits between these two ends of the spectrum.

There is also a lot of variation in both state inspection of farms and slaughterhouses and private sector inspection. As outlined earlier in the country sections, Norway and Sweden have the most rigorous state inspection service. Still, within both these countries and the rest of Europe, private sector quality assurance schemes form the main mechanism to ensure farm animal welfare standards are being met. In the very consolidated Dutch pig sector, the vast majority of production is covered. Likewise in the UK, AFS covers the majority of production. France and Italy have the least coverage of QAS in the conventional sector – 60 per cent of Italian pig sector is *preparing* to comply with EU and Italian legislation.

Most welfare initiatives have been focused around animal health (with Swine fever and more importantly multiple weaning syndrome) and stress around time of slaughter. These issues have direct impact on production (in terms of volumes and quality) and so have been embraced by the industry and easily translate to the end consumer (better quality (tasting) product and safer).

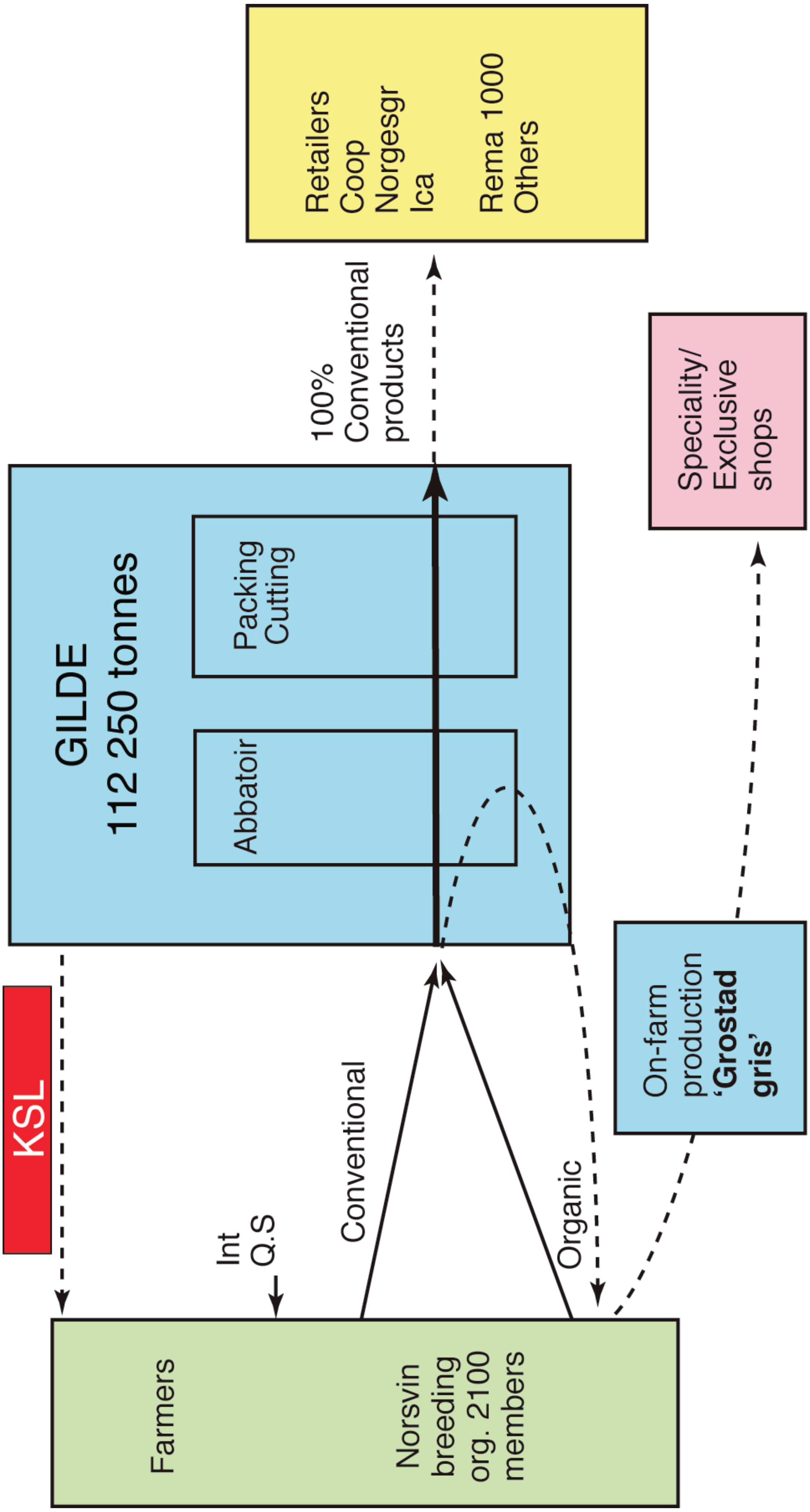

FIGURE 11.6 Gilde retail distribution and supply network.

11.4.2 General Characteristics of Pork Products and Market

Pork is a relatively homogeneous, commodity throughout Europe (named the poor person's meat in France). There is little variation in breed – modern breeds are selected for good feed conversion rates and low fat conformation, suited to predominantly indoor, intensive production units. It is a heavily consolidated industry in the countries studied with the possible exception of Italy.

In the 'southern European' countries studied, processed pork constitutes the majority of pork consumed (which poses some difficulties for farm animal welfare information in terms of traceability, requisite quality and marketability).

11.4.3 Organic

Organic is the most developed 'non-conventional' production system across Europe – in terms of consumer knowledge and government assistance (Norway).

Example 1: Norway

Gilde (a manufacturing company owned by the Pork Farmer cooperative) retail 58 per cent of all pork products and own half of all the pig abattoirs. Nearly all of pork distribution comes from conventional production; alternative products are by contrast very small-scale and there are no labelling conventions to differentiate these product types. Barriers to increasing, for example, organic pork production lie in the lack of infrastructure in abattoirs to create organic production lines.

Alternative producers are in the process of finding their own processing alternatives. The most prominent example is 'Grøstad gris' (Grøstad pig), which is promoted as an animal welfare product and complies with the organic scheme of autumn 2006. Grøstad Gris is a manufacturer brand with specific requirements on animal welfare concerning free-range access, transport (maximum one hour), and a maximum number of pigs during transportation (20 individuals). Their products are distributed mainly to speciality shops and specific supermarkets. Another example is an abattoir called Prima, which recently promoted 'Jærens smak' (The taste of Jæren) as a regional quality label. The abattoir has introduced its own quality scheme for farmers. Their scheme has implicit animal welfare gains, as all producers are located not more than one hour driving distance from the abattoir. But the label is primarily marketed as a quality product where animal welfare is subsumed under taste.

The success of organic pork in Europe is a distinctly market-driven phenomenon strengthened by current EU legislation and assured through certification systems.

However, organic pork is possibly the sector that has seen the smallest growth in market shares. There are number of possible reasons for this:

1. final product remains relatively undistinguishable in terms of quality (particularly taste) from conventional;
2. high price difference in competitive i.e. cheap commodity sector;
3. difficulties with carcass balance;
4. importance of processed sector (with low demand for organic).

The most successful differentiation of 'higher' farm animal welfare production systems from conventional systems takes into account breed and feed, and it develops clear organoleptic differences between itself and conventional product (mainly achieved through higher fat content of 'older' breeds and post-slaughter processing).

11.4.4 Free-range

There has been some development of more 'free-ranging', non-organic systems in France and the UK, with greatest differentiation in the UK through outdoor-bred, outdoor-weaned and free-range claims defined according to industry norms. This can be argued has arisen from a need for UK producers to differentiate their product from cheaper imports (due to more demanding legislation, labour costs, land, etc).

Example 2: France

An example of a successful Label Rouge pork product is Limousine Free-range (Plein Aire) pork. It is produced under two distinct regulatory regimes, both of which represent the possibility of considerable added value. The first of these is the Label Rouge designation for Limousin Free-range pork; the second is the EU PGI designation, for which Limousin Free-range pork is one of only three pork PGIs in Europe. Significantly, the development of free-range production was not driven by animal welfare considerations per se, even though these have subsequently become a critical part of the product's distinction (and commercialization). Free range was seen as a potentially lower-cost option in terms of building investment at a time when changing EU and national rules were demanding substantial changes to the methods of pig breeding and, particularly, to stocking densities and space minima. The Porc Limousin fermier (free-range) Label Rouge is commercialized under a variety of names and categories in order to minimize internal competition within the production sector and to multiply the retail opportunities. Hence we can distinguish:

- 'Porc fermier du Limousin' (Label Rouge, PGI) – the term used within the major hypermarket and supermarket retailers;
- 'Cochon Paysan' – name used when sold through traditional butchers shops where it is sold as Label Rouge but not as PGI;

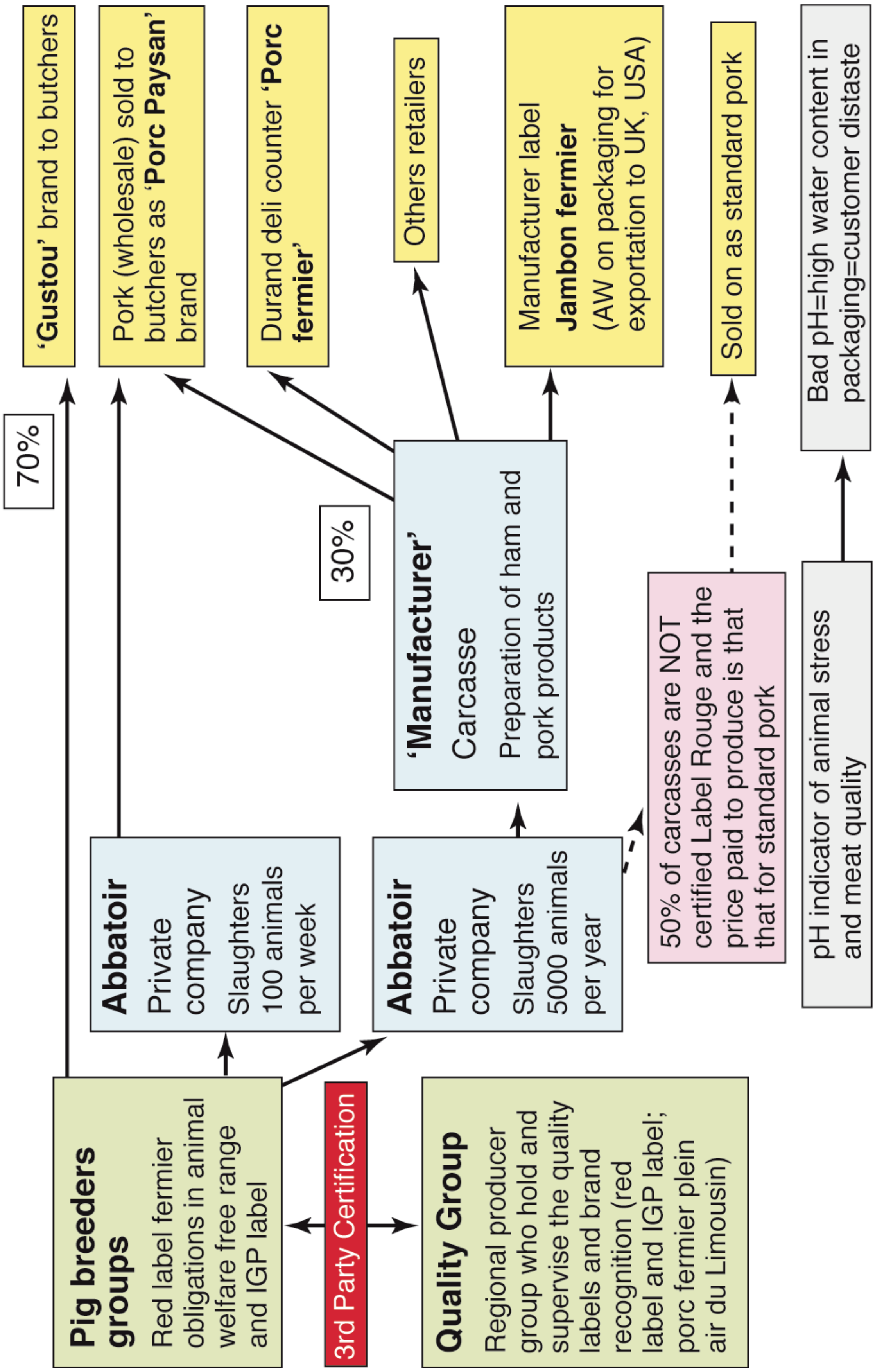

FIGURE 11.7 'Porc fermier' retail distribution and supply network.

- ‘Gustou’, a product name launched in 2001 by Bevicor, which again refers to the Label Rouge criteria but not the PGI, and it contains the words ‘Respect : Traceability : Quality’ on the label accompanied by an anthropomorphized pig preparing a dining table.

Both the producer group who developed the product and the retailers who sell it say that it is the higher gustatory quality and ‘naturalness’ that sell the product rather than animal welfare standards per se.

From this discussion, the importance becomes evident of Quality Assurance Schemes, PDIs and AOCs as a mechanism in the production and construction of products carrying claims of higher farm animal welfare.

In Italy, most current schemes meeting or exceeding legislative standards are either producer led or retailer led. Italy has strong PDO and PGI regional branding of meat products. This is especially true in processed pork products – for example, Parma ham or San Daniele ham – which all have production and slaughter criteria that must be adhered to.

There are some examples, notably Freedom Food pork in the UK and Terry Schweitzer pork in France, that specifically differentiate themselves on welfare grounds. Freedom Food is a dedicated farm animal welfare Quality Assurance Scheme developed by the RSPCA (Royal Society for the Prevention of Cruelty to Animals). Comfort Class pork in the Netherlands is an initiative to develop a similar scheme. Terry Schweitzer pork is a small-scale producer group, non-assured, that nevertheless claim to have a welfare-friendly system. They supply into Auchan stores in the region under their range of distinctive local products.

Retailers across Europe, especially at the ‘quality’ and ‘ethical’ ends of the spectrum, have also been influential in developing alternative production systems.

Example 3: Italy

Coop Italia is a good example of retailer-led QAS – for its pork products, it works closely with Italcarni to ensure both national standards are met as well as its own standards (developed in accordance with ‘consumer demand’).

Example 4: UK Waitrose pork

Waitrose and their supplier BQP/Dalehead have recently reviewed their on-farm requirements [codes of good agricultural practice, GAPs], including animal welfare components, for their pork. Their category has been rationalized into three tiers: BLEP/LINK, free range and organic. For each line, they have specific breeds/crosses they use that are deemed best adapted to the particular production conditions. BQP have an in-house vet and they monitor the performance of their farms closely, and each farm is audited under AFS and Freedom Foods.

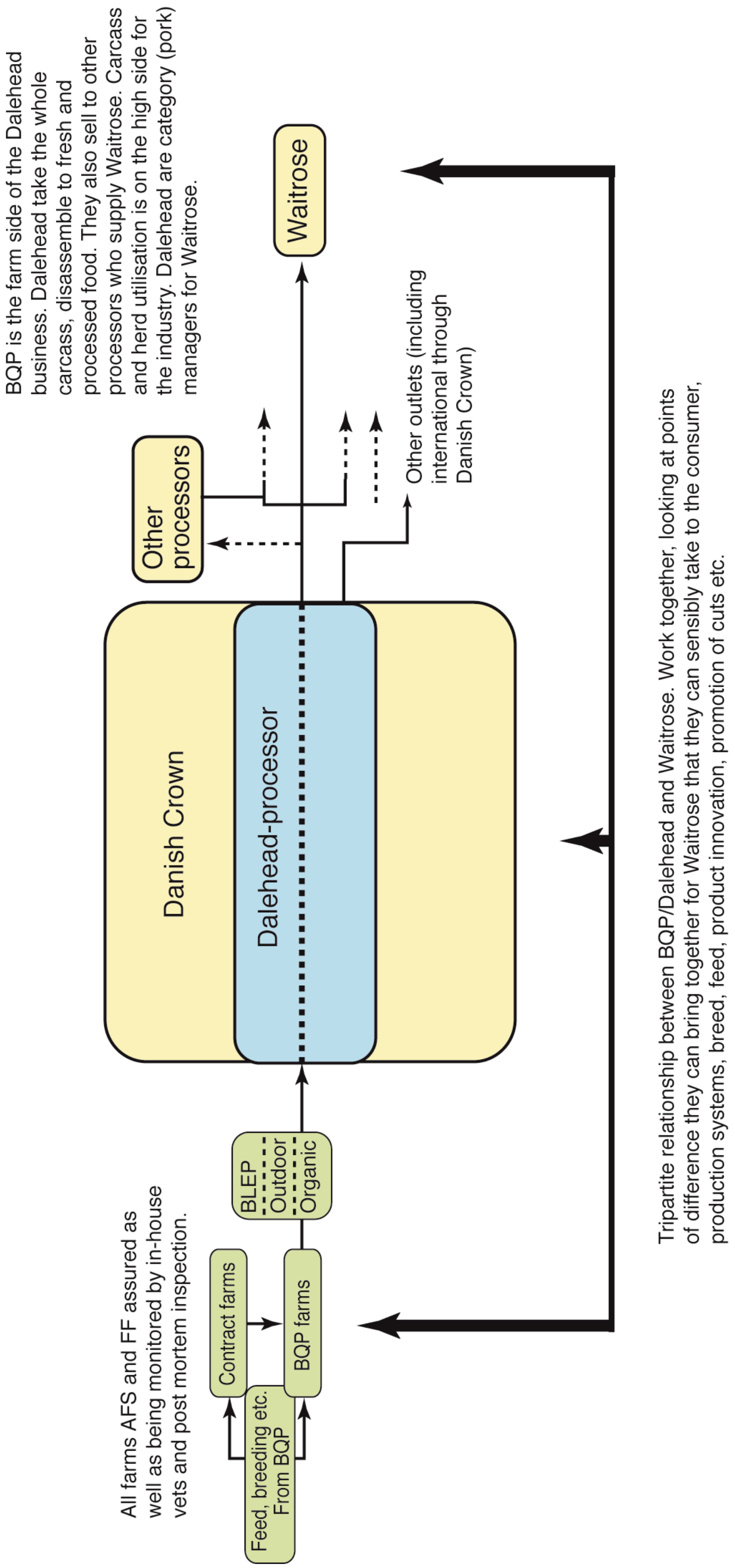

FIGURE 11.8 BQP/Dalehead retail distribution and supply network.

Their basic offer – 'Farmhouse' pork, established as early as 1983 – became BLEP, Basic Level Entry Product. Within these requirements, the pigs are 'outdoor bred, outdoor farrowed and then they come indoors for fattening', they are not subjected to growth promoters, the farms have specific herd plans, the pigs have access to straw, etc.

Free-range pigs are outdoors throughout their entire lives until slaughter. A number of specific criteria have to be met. These include: no growth promoters, specific herd plans, access to straw, the use of a traditional breed exclusive to Waitrose – the 'Hampshire' – and all pigs have to be grown in two UK counties. This allows Waitrose to market specifically their 'bespoke' supply network on the product packaging. To quote:

> 'Specially selected Waitrose free-range pork, produced from the Hampshire breed. … The gently rolling countryside of North Norfolk, its climate and free draining soil, is perfectly suited to rearing pigs outside all year round. The Hampshire breed, produces pigs that thrive in the outdoors and are allowed to roam and root freely.… Roger Newton supplies Waitrose with English free-range pigs from his farm in Norfolk. Pigs reared outside are kept in small family groups and fed on a balanced cereal diet with vitamins and minerals. Warm shelters and dawn bedding protect them from winter, while mud baths keep them cool in summer. Care, commitment and high standards of animal welfare ensure succulent tender bacon.'

Organic pigs reared to Soil Association standards are bred, weaned and finished on single farms. They are weaned at six weeks (two weeks later than BLEP and free range) and are a specific cross that is specially suited to an organic, free-range production system.

Over the last 20 years, Waitrose have developed a supply network that is built on 'tripartite' relationships between producers, processors and its buying and technical team – a 'vertical partnership' allowing for innovation and differentiation.

In terms of farm animal welfare, this means that producers, BQP/Dalehead and Waitrose have been able to develop a production system that has 'high' animal welfare and quality credentials, which are a real point of difference with the more 'generic' pork on offer at other retailers.

> 'So we are always working with them in terms of looking at points of difference we can bring together for them that they can sensibly take to the consumer' (BQP).

11.5 EGG SECTOR

11.5.1 Regulation

Legislation concerning layer hens has probably the most visible progress in terms of farm animal welfare legislation to date in Europe. Conventional cage production is due to phase out in 2012 (although the likelihood of this happening across Europe is debatable). European legislation (1988; 1995) has established the baseline standards for all eggs produced in the EU to be labelled as barn and free range. This has had an important positive effect on the market for barn and free-range eggs – partly through simplifying the category and underwriting the claims being made.

11.5.2 Market

The egg industry is heavily consolidated in most of the study countries, with one to three packers/manufacturers dominating retail supply, with varying degrees of integration with producers.

This is probably the most interesting and diverse sector with regard to product differentiation, product marketing, using farm animal welfare standards, certainly in the shell-egg market. A number of possible market drivers can be pinpointed behind this phenomenon.

- Extremely negative image of caged layer hens, which goes against most lay notions of what constitutes good or acceptable level of farm animal welfare. It also goes against notions of the 'naturalness' and, consequently, the 'healthiness' of food/egg production. In turn, the caged layer serves as an easy comparison with the 'higher welfare' systems of barn and free-range production, primarily along lines of space and freedom of movement. The dimension is one that consumers clearly empathize with, understand and buy into.
- Relatively easy for retailers to push/encourage welfare-friendlier options in their egg category, benefiting their brand image (Dutch and UK retailers have been most active here).
- Relatively small increase (compared to equivalent in other sectors) in production costs for barn and free range, which means little extra costs for consumers choosing welfare-friendlier options.
- Highly integrated and consolidated sector in most study countries (exceptions are Italy and to a lesser degree France)
- Some informants and commentators argue that differentiation along welfare lines emerged as a result of eggs being a relatively homogeneous product hard to

differentiate along other ‘quality’ attributes, such as taste (although this is happening in some countries, along with development of added ‘health’ benefits – omega 3 eggs). Consequently, it has been pushed by packers/retailers keen to develop the category beyond purely commodity (and low profit) offers.
- Eggs do not have the same difficulties in balancing units of production.

Example 1: Netherlands

The most well-known free-range egg in the Netherlands is the ‘Grasei’, Grass egg. The Grass label is in control of an independent foundation, founded in 1993, and the first Grass eggs were sold at Albert Heijn. Its rules are stricter than the EU rules for free-range outdoor. It was also developed beyond the product group of eggs – for example, for pork, beef, and poultry products – but these products are rarely found. Grass eggs carry the IKB free-range logo (EU conform) controlled by CPE (Control Office for Poultry, Eggs and Egg products). In addition, the independent Grass logo is on the packaging.

Example 2: Norway

Of total market share, 11 per cent of eggs are free range, 1 per cent is organic, 78 per cent are caged.

The failure to clearly label ‘caged’ eggs has resulted in an oversupply of free-range eggs. Norway often seeks to take the ethical advantage from other countries. For example, it has slightly better legislation for caged hens, three per cage rather than four per cage, and enriched cages will contain seven per cage rather than eight per cage over the rest of Europe. Yet animal welfare NGOs are quick to point out that this does not mean that Norway is the best, because there is a reluctance to label products as ‘better than’ something else since the majority of the farming cooperatives who market the products are farming conventionally. The mechanisms of cooperative solidarity norms counteract ethical product differentiation.

Prior (a leading egg manufacturer in Norway) differentiates according to egg qualities such as size, colour, hen feed but, importantly, not in terms of properties of production (free range, caged, organic, conventional).

The increase in organic eggs is the result of a ‘whole-chain agreement’ developed with a government incentive to Prior, producers and the retailers CoopMega and Norgesgruppen.

11.5.3 Organic

There is relatively healthy growth in organic sectors in all the countries studied, with the exception of Hungary. The majority of organic systems are free range, with differences in stocking densities and feed. In the UK, there is a market differentiation between eggs produced to different organic certification schemes. Soil Association eggs carrying a premium of 15–20 p for the consumer on a box of six eggs. This extra cost is mainly due to tighter farm animal welfare standards (lower stocking densities and flock size) as well as stricter feed requirements.

11.5.4 Animal Welfare beyond Consideration for 'Space'

Whilst providing an easily understandable basis for welfare improvements, space and freedom of movement are only one of a number of welfare issues (including feather pecking and cannibalism) that do not necessarily improve with higher space provision. Some argue that actual welfare improvements are debatable in barn and free-range systems, with a simplistic focus on space obscuring a more detailed understanding of overall welfare. In the UK, probably the most developed market for 'welfare friendly' shell eggs, we have seen the development of more nuanced free-range systems, incorporating hardier breeds more suited to outdoors and sheltered and woodland ranges ,which are said to be more suited to the chickens' preferences.

11.5.5 Processed

Whilst there has been rapid growth in barn and free-range in the shell egg market, processed egg (which accounts for the majority of production) is, with some exceptions (for example, M&S products in UK) sourced from caged production systems. The focus here is principally on product integrity, food safety and price. The majority of countries researched were largely self-sufficient in the shell egg sector (partly due to short shelf life leading to logistical and cost problems in international trade), whilst processed egg is much a more global commodity. There is a growing market for free-range processed egg, which is outstripping supply of second grade eggs from free-range systems (drawing supplies from first grade, thereby driving prices up).

In some countries, notably the UK, the growth of free-range production has begun to meet some obstacles in terms of land-use planning restrictions.

In conclusion, animal welfare is clearly a significant dimension within the egg market across the six partner countries. Caged eggs provide the baseline, commodity product, with 'added value' products explicitly marketed in contrast to caged. With the ban of traditional cages in line to be introduced in 2012, the commodity level will move to enriched cages.

12

COUNTRY SUMMARIES

This section offers a country-by-country analysis of how the market for animal welfare-friendly products works. There is a discussion of national regulation, what products are currently available, an analysis of the product sectors in the country and, finally, a discussion about the potential for growth in the country. It is useful to consider the country as a unit of analysis, because there are significant differences in the governance structures between the six European countries discussed here. These differences have a major impact on how the market operates as they reflect the capacity for the market to behave in different ways. Additionally, there are historical, social and cultural differences between different parts of the supply chain. Farmers are more dominant in some countries than in others, reflecting different opportunities available to them to mobilize themselves politically. If we consider the retail sector, there are a number of global retail players, and how they tackle the issue of animal welfare is different as they contend with social and cultural differences and, as mentioned, different regulatory systems that limit or permit different activities. Thus there are some common tendencies to how the market for welfare-friendly products is developing across Europe, which we discuss in the conclusion to this chapter, but it is also still important to note how differently the issue of improving farm animal welfare is currently played out in different national contexts. If a pan-European solution is advanced, it must happen with some sensitivity to these national variations.

12.1 ITALY

12.1.1 How Does Italian Animal Welfare Regulation and the Level of General Interest in Animal Welfare Limit or Develop the Market for Welfare-friendly Products?

There are two regulatory bodies in Italy that are connected to farm animal welfare. The first is the Ministry of Health (MH), whose aims are to spread the concept of respect for animal welfare and to encourage compliance with the respective national laws. The second is the Ministry of Agriculture and Forestry (MIPAF), which is mainly concerned with increasing knowledge and information on Community legislation. It is also involved in giving incentives to increase compliance or to indirectly support those farms that may lose out from CAP reforms. However, in many ways MIPAF has little specific interest in farm animal welfare at sector level; in contrast, the regional and consumer authorities are working on creating 'national brands' for production systems that reach higher than legal standards for animal welfare. The MH supports this initiative, recognizing the key to success resides in devising mechanisms that give financial recognition for products with improved animal welfare where the farmer may have incurred additional costs. Institutional experts agree that this strategy has proved successful already within the zootechnical sector. The MH and MIPAF both commented upon the insufficient articulation of how to meet legislative standards and the commercial advantages of doing so. Italian Regional Administrative Authorities have been working for several years to create objective evaluation models for animal welfare standards.

Generally, Italian trade associations find that there are barriers to advances in farm animal welfare. These barriers include: conflicting laws; a feeling that EU regulation on animal welfare is typically a reflection of North European culture; technical provisions within legislation that are not very flexible and that tend to entail high costs in order to meet them. International competitiveness is also seen as problematic with regards to raising animal welfare standards across Europe. Following animal welfare legislation and improving it further does add value, but that value is perceived currently in Italy as negligible and in relation to specific species such as laying hens and not to the dairy sector. In the case of milk and dairy derivatives, the relationship between animal and final product is less direct compared to the meat situation. The fear is if too much emphasis is placed on animal welfare, consumers could be persuaded to stop eating meat.

Italy has particularly strong regional authorities, and there is a marked disparity in the application and observance of the regulations from one area to another; additionally, they have the power to establish their own laws. For example, the province of Bolzano launched a strong animal welfare policy in 1986, which advances a meaning of animal welfare as more than just the absence of disease 'but psychophysical welfare; in other words, not just the absence of clinical symptoms' (Autonomous Province of Bolzano). Other meanings of animal welfare also exist. For example, the MH advocates the Five Freedoms. The Italian farmers' organizations take far narrower definitions of animal welfare, perceiving it in economic terms to safeguard the health and welfare of the farm animal. Italian retailers rarely implement animal welfare to guarantee the quality of the products. Meanwhile, the processing industry focuses on animal welfare as a tangible, distinguishable aspect and so is attentive to animal welfare legislation, and yet the need to achieve a quality product still exceeds the need to achieve an ethical product. The retailers are generally orientated towards attention to European and national legislation standards and maintaining competitive market prices. However, there are exceptions, such as Coop Italia who engage with animal welfare at a farm more detailed, all-encompassing level.

A variety of meanings of animal welfare exist in Italy, which indicate diverse knowledges and interest in animal welfare. Individual operators have a greater or lesser knowledge of animal welfare, but these knowledges do not correspond to an ethical/moral awareness in the real sense of the term. The concept of animal welfare remains exclusively linked to animal health in terms of yield, quality and reproductive performance. Consequently, operators focus their attention on the elements of animal welfare that have an immediate impact on the product; first, the health aspects, more directly linked to an effective qualitative and quantitative improvement in production.

There is a lot of variation in Italian farmers' interest in animal welfare, from those who show little or no interest to extremely attentive entrepreneurs. Farm size appears a factor – for example, medium-to-large breeding farms tend to be more readily disposed towards observance of the laws, while small farms find it more difficult to adapt. If legislation was more strongly enforced then those farms that cannot make the investments required for adaptation would probably be forced out of business. Also, sectors respond in different ways. Cattle breeding farms have always considered animal welfare as a priority to ensure yield and higher profit. The poultry sector is driven by moves to technologize the animal.

12.1.2 The Current Italian Retail Market for Animal Welfare-friendly Products

According to MIPAF, the percentage of animal welfare-friendly products is fairly high – the meaning of animal welfare-friendly products is likely to mean it complies to legislative standards. All those interviewed maintained, on the one hand, that all products complied to the minimum requirements imposed by the animal welfare legislation and, on the other hand, that these producers were very rarely differentiated in the market – that is, they did not communicate expressly that they were animal welfare friendly. They identified manufacturer-branded supply networks and products as those that were generally distinguished by higher levels of attention to animal welfare. In terms of sales, private-label products were considered the most important category, followed by products from the butchers counter and, last, products bearing producer labels. The producer-label products tend to place the emphasis on the evocative image of the natural product rather than on animal welfare. Consumers seek out most frequently poultry products (meat and even more eggs, with specific declarations established by specific law on the type of breeding farm). Where there is more price pressures, for example in milk, it is harder to launch welfare-friendly products.

There is a differentiated *price strategy* by the retailers. Sometimes welfare-friendly products were discussed, while others made references to various lines such as those belonging to specific supply networks and or distinguished by private labels. Compared to conventional products, branded supply network products cost 10–15 per cent more, while in other networks the price is 10–20 per cent higher. Operators feel it is extremely risky to venture outside the price range of more than 10 per cent (unless backed by a strong advertising campaign). Chains do not normally run price promotions for animal welfare products as there is a fear that such initiatives could short-sell the product and its image. The medium-to-high price bracket is the most frequently encountered situation, not so much due to the animal welfare-friendly factor but due to the additional production, high value livestock and marketing costs of traceable supply network. With low demand, it is difficult to build up an economies of scale, which results in a considerable barrier to growth of animal welfare products. In some supply networks, such as the dairy cattle supply network, raising an animal well or badly does not attract extra costs since it is a highly evolved system. In contrast, welfare costs money for the supply networks of veal, eggs and poultry. There are a few examples of higher margins on welfare-friendly products in comparison to conventional products.

The first requirement of retailer networks is that suppliers comply with the legislation in force on animal welfare. This holds for all distribution companies in the first three groups above. But in the case of 'indifferent' companies, it is simply taken for granted that the supplier is in conformity with animal welfare legislation on animal welfare since checks are not carried out, because the network does not have the necessary structures. Companies considering animal welfare as a quality instrument, and especially proactive companies were much more likely to carry out checks. There appear to be diverse approaches to the inspection for animal welfare. In some cases, inspections are carried out at slaughterhouses, but not upstream of this (at the breeding farms). Other distribution enterprises control what takes place in the slaughterhouse and encourage the slaughterhouse to perform controls on the breeding farms that supply them. Others run controls on the supply network on a sample basis – by rotation – from animal welfare material through to the finished product, hence from the breeding farm to the slaughterhouse to the cutting phase.

Often, there is a preliminary phase in which animal welfare conditions must be defined, perhaps together with experts from the world of science and which is shared with the other players along the supply network. Proactive companies – for example, Coop – are those most committed to identifying indicators of animal welfare. Generally, the private label sector in the retailers are the most meticulous with their control procedures. With this in mind, the extreme fragmentation of the production sector is an obstacle to increasing standards, for it is not always possible to choose the best breeding farms regarding animal welfare as they may not have high enough output levels. It is rarely farmers that initiate improving standards, unless they seek ways to increase profits. Mostly, improvements are initiated by the processing industry attempting to break the 'commodity product' logic, or by retailers who want to use animal welfare an implicit or explicit quality to diversify their offer to attract different market segments. The retail distribution network has the power to condition the behaviour of all players upstream, urging the production sector to take the animal welfare issue in hand.

Who Is Leading the Italian Market Developments?

For some the prime motivator in the sector is thought to be the consumer, since they express the expectations of the final demand. They understand that a healthy environment can only generate a healthy product. Others see the processing industry as leading the need to improve, since they often request from suppliers technical specifications that exceed the law. However, many insisted upon the need for a kind of public campaign that would be sensitive to various supply network operators the animal welfare issue (for example, farmers must be persuaded, otherwise they would perceived animal welfare as an imposition. Carefully conceived institutional campaigns can also help to raise consumer awareness of the concept. It is no coincidence that the animal welfare-friendly products most frequently purchased by consumers are those for which major investments have been made in communications: chicken and Parmagiano-Regianno cheese, the images of which imply direct links between animal welfare and product quality. Undoubtedly, the concept of animal welfare will need to be presented alongside other elements (quality, tradition, environment, health, territory, etc.) in order to ensure a wider appeal. A product concept based solely on animal welfare requirement would be extremely difficult to present to adequate advantage.

Strategies – Proactive

Animal welfare is an extremely important factor but at the same time Italian industry – for example, Coop Italia – is aware that it does not constitute an element of direct competition but rather a company philosophy, an element of value policy that can contribute to defining the image that the company wishes to portray. Such considerations are made with the notion that the consumer needs values and companies are going to have to get increasingly more used to marketing such values.

1 Animal welfare as an instrument of quality. Animal welfare as an implicit quality guarantee. There are product networks – for example, Coop Italia beef and pork – that consider animal welfare exclusively (or almost) as an important tool for obtaining and maintaining quality standards in the range of commodities offered to the consumer (if the animal is raised well, it is less subject to disease, ensures less stress and hence it produces better quality meat). If animal welfare does not produce tangible quality compared to conventional product, the issue of animal welfare is of no interest as some retailer chains have confirmed.
2 Animal welfare as a sales point. Animal welfare is one of the requirements in the supply network. The classic standards of animal welfare represent technical acceptance elements for supplies, on the basis of both regulations and parameters laid down by the retail chain itself, which go beyond European legislation to create a differentiation of the product in the sales point – for example, particular attention is paid to the animals litter, to animal density, to lighting, to the absence of toxic gases, to nutrition, transportation, to the prohibition to use electric stunners during slaughtering, etc. On occasion, the concept of animal welfare is conveyed to the consumer as an important means for improving the quality and safety of the products.

These two different ways that animal welfare is used as an instrument of quality relate to only exclusive products in ‘controlled supply chains’, or private label products.

3 Private branding or controlled supply networks is increasing in Italy, and the ‘category management’ of the distributor is translated into a more continuative relationship with the producer/supplier, although this is less satisfying for the latter

as the system further reduces the supplier's already lean margins. There is a gradual increase in the role played by modern distribution in the vertical coordination of the supply network, to establish key marketing factors and to generate customer loyalty. The private label is increasingly more competitive compared to the manufacturer label, becoming the main factor attributing market value to the products. Thus there is an increasing presence of retailer-own brand on shelves, conveying to the consumer their role as 'endorser' of the quality of the 'private label'. The assortment policy of many networks guarantees both a strong expansion of the own-label product and a development of guaranteed supply networks, distinguished by control systems that enable food network monitoring and the maintenance of close connections with producers. (This is particular true in the meat sector, which has suffered frequent scandals and consequential upheaval.)

Strategies – Not Proactive

1. Animal welfare to meet minimum legal requirements. For other retail chains, the aim is only to offer products that safeguard animal welfare, products that fall within mandatory legislation guidelines. In these cases, the seller does not differentiate – animal welfare is simply considered an element that cannot be dispensed with, from the standpoint of legality and guarantee of safety. Occasionally initiatives are launched with selected suppliers, to re-evaluate the production supply networks in order to adapt them to the legislation currently enforce.
2. Indifferent attitude. Some retail distribution networks, such as manufacturer brands, are indifferent to animal welfare; refusing to implement specific strategies and to assume an active role in animal welfare development. The reason for this is closely connected with the fact that there is no demand for these products and with the conviction that the main role of a commercial operator is to respond to the demands of the consumer. This is the main barrier to growth of animal welfare products stated by retailers and butchers.

12.1.3 An Overview of the Italian Animal-based Product Sectors

Poultry Sector

Ten to fifteen per cent of broiler chicken companies are thought to keep birds under free-range production systems. The Amadori 10+ is an integrated poultry supply network that leads indirectly to higher welfare for chickens for a number of reasons: an official vet certifies the correct execution of farming practices and the quality of the animal; the slaughter plants that participate in this supply network are ISO-9200 accredited, thus they are moving towards gas stunning as opposed to electrical stunning; specially selected breed; chickens raised outdoors. None of these features are communicated to the consumer; it is sold as a quality poultry product.

Beef Sector

A lot of beef fattening goes on in Italy, 47 per cent of the animals come from abroad (79 per cent France, 89 per cent EU15, 99 per cent EU25). Coop Italia handles 25 per cent of meat in Italy. All the beef sold in their stores comes from Coop controlled supply networks. Farms are selected according to farming methods that respect the environment, animal welfare and assure high hygiene standards. Wholesalers importing beef from France sign contracts to ensure they only sell animals that comply with Coop specifications. The supply network is audited by Coop and CSQA and controls 310,000 heads/year. Supplies also sign an ethical code of conduct. Commercial relations between operators in the chain and consumers must respect ethical behaviour and transparent, collaborative management in all operational phases. Animal welfare requirements focus on behavioural, physiological, pathological and production indicators in the farms for the concrete implementation of animal welfare standards with a view to the ethics and the improvement of quality and safety of the finished product.

Pork Sector

Over 60 per cent of the pig sector is preparing to comply with legislation. Italcarni produces 5 pork lines – 2 with manufacturer brands and 3 for major retailers. They supply to Coop Italia. Animal welfare conditions are established at two levels: first, the application of industry standards; second, those standards demanded by the consumer (for example, Italcarni passes these demands onto the farmer and analyses and checks the conditions needed to apply the standards and satisfy the additional requests of the customer). There are restrictions on the breeds that can be used in the supply network. All breeds on the Italian Genealogical Register for large pig production are permitted. The Consortia of Parma and San Daniele exclude purebred Belgian Landrace, Hampshire, Pietrain and Spotted Poland. Stabling at the slaughterhouse must be as short as possible, if exceeding 12 hours the pigs must be fed. The production specification of the Consortium of Prosciuttio di Parma and San Daniele state the age at slaughter must not be less than 9 months, live weight between 144 and 176 kg).

Italcarni boasts voluntary certifications for UNI EN ISO 9001/2000, the quality management system, UNI EN ISO 14001/96 and EMAS, concerning environmental management, and FSIS (Food Safety Inspection Service), accredited for animal welfare. They are therefore authorized for export to almost all countries in the world. The distinguishing feature of the supply network is the use exclusively of Italian born, bred and slaughtered pigs, appreciated by customers.

Dairy Sector

Granarolo 'Alta Qualità' (High Quality) milk has been produced since 1992. The strict production specifications laid down by Italian law no. 169/89 concerning not only production and commercial parameters but also animal welfare parameters (the selection and state of health of the cattle, feed, stable hygiene and milking procedures). Its marketing campaign is based on inputting retail brand values, naturalness, health and its Italian origin. A TV marketing campaign showed a cow lying on straw in a stall, showing the ‘maire laitier’ taking her for a shower, to show the loving attention Granarolo gives to its animals, and thus the high quality of the milk. Together with Granlatte, Granarolo defines the farm production standards (free stalls with berths; size and type of stabling; growth and animal welfare parameters; strictly natural feed) that are rewarded. Granarolo has chosen an integrated approach to its quality policies, setting economic, environmental and ethical objectives throughout the whole food network. It also follows the Ethical Code and the SA8000 certification, which forces the company to promote continuous improvement through its supplier network. Granarolo are keen for an animal welfare certification scheme to exist, so they can make clear marketing claims. They have coined a slogan ‘Beyond the label, the ethics’ as a ‘different way of doing business’.

Parmagianno Reggiano

There is no special animal welfare requirements of the milk that goes into making the cheese. It is made in 5,000 dairies, collecting from 5,400 farms, one sixth is produced directly by upstream-integrated diaries. Of 110,000 tonnes produced, 97,000 are sold to wholesaler-maturers, and 14,000 are sold to foreign markets. In milk production, like in other sectors, animal welfare is mainly or exclusively considered a tool for quality standards, rather than for ethical purposes. Animals are usually shown in bucolic surroundings to reinforce the concept of nature or speciality. Parmegiano Reggiano is a prestigious, virtually untouchable product, and thus the question of animal welfare does not occur to the consumer, because for many consumers animal welfare is about quality and Parmegiano Reggiano is at the top of the quality scale.

Egg Sector

Granarolo markets its eggs as ‘Prima Natura Bio’. Organic eggs constitute 9.4 per cent of consumption value. Currently, there are no significant free-range, non-organic egg levels.

Of the Granarolo range:

- 817 tonnes, 3.4 million euro, organic;
- 1,960 tonnes, 3.8 million euro, caged;
- 1,484 tonnes, 3.7 million euro, free-range.

There is no explicit mention of animal welfare in marketing. ‘G’ is stamped on all eggs and communicates quality. A website communicates product origin. Traceability info on packaging shows where eggs are from; they all come from selected Italian farms. Hi-line Brown and Warren are the two specific breeds that are reared on laying farms; they are free ranging, organic fed and integrated with no more than 20 per cent conventional feed (as foreseen in the organic farming regulations). The egg market is characterized by brand fragmentation, and yet there has been growth in production concentration and commercial synergies. The private label accounts for 34 per cent of the total market and is constantly growing. These changes in the structure of the egg market are primarily a result of EU level regulations and the new regulatory framework for egg traceability and labelling.

12.1.4 What Is the Potential Italian Market for Welfare-friendly Products?

Today, consumers increasingly demand assurances and guarantees of quality and safety, but not in terms of animal welfare. Animal welfare entails greater costs: retail distribution chains only show interest if animal welfare generates commercial advantages. For example, the majority of operators had never encountered pressure from consumer groups or consumers on the issue of animal welfare. Only in a few cases were experiences of co-marketing operations with the Legambiente environmentalist group or collaboration initiatives with animal welfare organizations reported. Some respondents felt that consumers were not interested enough to promote products with explicit animal welfare, whereas for others it was the attentive and ethically demanding (environment and food safety) consumer that was propelling this development.

For others, the national and European institutions were seen as the prime motivator on the basis of requests coming from the more advanced brackets of society. These are those retail chains that see animal welfare as an essential part of regulation. The European Union has also generated commercial and operational challenges leading to the review of supplier contracts and the composition of product assortments have changed. 'Indifferent' companies in particular commented that provisions imposed by control bodies normally brought about increases in prices and a decrease in profit margins for all market operators. Whereas as those using animal welfare as a quality instrument indicated an improvement in product quality and profit increases.

From a 'business to consumer' standpoint, animal welfare is not a variable normally used as a point of differentiation. It is felt that it doesn't stimulate sales alone and has to be combined with other factors. When combined with food safety, animal welfare is successful. The case of organic products is different, for consumers make the purchase because they consider it to be a safer option for their health. There was diversity to opinions about whether animal welfare was implicit to organic. The animal welfare products that consumers seek out more frequently are those belonging to the poultry sector (meat and, in large quantities, eggs, which bear explicit declarations established by specific law on the type of breeding farms). Compared to conventional products, branded supply networks apply prices that are sometimes 10–15 per cent higher than in other retailers, where the price is 10–20 per cent higher. Normally, there is no price promotion of welfare-friendly products. The challenge is to combine costs and animal welfare, as in general animal welfare is not a component for which excessively high margins can be applied.

12.2 NORWAY

12.2.1 How Does Norwegian Animal Welfare Regulation and General Interest in Animal Welfare Limit or Develop the Market in Welfare-friendly Products?

There is no or little knowledge about animal welfare in Norway. It does not have a media profile and so is not on the public agenda, but it is used as a risk management strategy by manufacturing firms and seen as a way to increase efficiency within the industry. Yet, the push by the Norwegian authorities to increase organic farm land to 15 per cent and to connect higher animal welfare production systems with organic farming methods may lead to an increase in the profile of animal welfare in the future. The only exception is pig welfare, which is promoted by the pig industry companies themselves and not the authorities (we will discuss this in more detail).

In the Norwegian case, power is not with the retailers but with the manufacturers and farmer cooperatives. The government allows farmer cooperatives and manufacturers to regulate the market; they fix prices and are shielded from Norwegian competition law. Consequently, the farmer cooperatives hold a monopolistic market share in milk, meat and poultry markets. Thus the move to increase organic meat sales and increase organically farmed land is orchestrated by the authorities.

There is a significant development in the Norwegian retail sector to improve animal welfare standards as a result of the authorities actively promoting the Whole Chain Agreement to increase the amount of land in Norway producing organic products to 15 per cent and increasing the presence of organic produce in the market. This Whole Chain Agreement is being promoted by the authorities through financial incentives and is an approach to overcome the obdurancy of the farmer cooperatives, who are so dominant in the food retail market in Norway. As a consequence, they are against any moves to differentiate the food retail market in terms that might suggest that some food production methods (for example, organic) are better than others. Financial incentives are given to all members in the supply network for their participation – farmers, retailers and the large farmer cooperative-owned manufacturers such as Prior (egg and chicken products), Gilde (beef and pork products) and Tine (dairy products). Hence, we find in all sectors – eggs, chicken, pork, beef, dairy – progress towards increasing the quantity of organic farm land to make organic products but also an increase in attempts to get these product onto retail shelves labelled organic. It is also clear that the increase in organic productivity has meant that there is a lot of downgrading of organic products to be sold at the conventional standard.

Regulation

A new animal welfare act came into force on 1 January 2007 and two of the quality assurance schemes merged (KSL and Matmerk). It was devised through work with animal protection groups and producer-interest organizations, which indicates the weak influence of retailers and manufacturers in the regulatory framework in Norway.

This new act focuses upon animals not human beings. Animals are given a higher status. The 1974 Animal Production Act is enforced through Food Safety Authorities and Local Animal Protection Boards (established in 2004). They are responsible to the Minister of Agriculture and Food, but also in part to the Ministry of Health Care and the Ministry of Fish and Coastal Affairs.

There is a traditional 'corporatist' approach to regulation in Norway. State and producer organizations negotiate centrally and this is then distributed through the country. For example, the KSL scheme, set up in 1993, meets legal specifications. It is a body for implementing national laws and regulations. The sales cooperatives Tine and Gilde support KSL through price incentives. The Debio Scheme (the organic scheme) sees producers audited annually, and not every 10 years as is the case with KSL. Great care is taken not to harm the image of conventional farming in any way but to just let the consumer choose. Action plans ensure that animal welfare is ahead of regulation. Currently, the slaughter process is under review.

12.2.2 The Current Norwegian Retail Market for Welfare-friendly Products

Retailers view Norway as having higher animal welfare regulations and so advertise products as Norwegian to convey this implicitly. Trade agreements and legislation are a basis for retailer policies about animal welfare; retailers do not add new requirements but only implement and systematize established requirements they are committed to.

Retailer own-brand products are limited (12–18 per cent), so most of the liability lie with manufacturers and retailers do not regard themselves as prime promoters of product differentiation and innovation. It is considered the responsibility of the processing industry. There appears to be a vague sense of increasing concern for animal welfare by retailers, but mature debate does not exist. ICA has statements in their Corporate Social Responsibility about animal welfare; Coop Norden does as well, although it is close to legislation. In contrast, Rema 1000 and Norgesgruppen have no statements, and they state instead that they comply to the British Retail Consortium. In general, we can say that retailers are ambivalent about the status of animal welfare in product assortments; animal welfare does deserve special attention for some products e.g. eggs only 11 per cent are free-range. There is growing concern in Norway but it is difficult to say why. The new ranges of Organic products, pushed by the Authorities, are promoted as 'pampered foods'; animal welfare is bundled in with this. Own-brand ranges in retailers are predominantly discount lines.

12.2.3 An Overview of the Norwegian Animal-based Product Sector

12.2.3.1 Egg and Poultry Sector

Egg

Of the total market share 11 per cent is free-range, 1 per cent is organic, and 78 per cent is caged.

The failure to clearly label 'caged' eggs has resulted in an oversupply of free-range eggs. Norway often seeks to take the ethical advantage over other countries. For example, it has slightly better legislation for caged hens – 3 per cage as opposed to 4 per cage, and enriched cages will be 7 per cage rather than 8 per cage in the rest of Europe. Yet animal welfare NGOs are quick to point out that this does not mean that Norway is the best, for there is a reluctance to label products as 'better than' something else since the majority of the farming cooperatives who market the products are farming conventionally. The mechanisms of cooperative solidarity norms counteract ethical product differentiation.

Prior (the leading egg manufacturer in Norway) differentiates according to egg qualities, such as size, colour, hen, feed but, importantly, not in terms of properties of production (free range, caged, organic, conventional).

The increase in organic eggs is the result of a 'whole-chain agreement', developed with a government incentive by Prior, producers and the retailers CoopMega and Norgesgruppen.

Poultry

There are no poultry products sold explicitly on welfare grounds; there is one high-quality tasting chicken, which is sold with implicit welfare attributes.

The competition authority stops mergers between egg manufacturers and chicken manufacturers, but this gets overruled in both cases by the Minister for Government. One independent, organic, small-scale chicken firm does have access to supermarket shelves.

Conclusion

The market structure reflects the restrictive import regulations and that the market is supplier-led by the dominance of one manufacturer Prior that covers 78 per cent of the egg and 60 per cent of the poultry market. These two conditions make it difficult for product differentiation and innovation. Any innovation, such as in the organic egg sector is led by the authorities who give incentives to producers, manufacturers and retailers to increase the market and distribution of organic products. In 1996, however, there were the first indications that consumers could influence the market through their own interests. Any future production differentiation on eggs and chickens hinges to a large extent on structural changes among producers; currently, it protects conventional production methods.

12.2.3.2 Pork Sector

Gilde retail 58 per cent of all pork products and own half of all the pig abattoirs. Nearly all of pork distribution comes from conventional production; alternative production method products are by contrast very small scale, and there are no labelling conventions to differentiate these product types. Barriers to increase, for example, organic pork production lie in the lack of infrastructure in abattoirs to create organic production lines.

'Grostad Gris' (organic, free-range labelled) and 'Joerens smak' (better tasting, implicit welfare) are the only exceptions. Despite Gilde not promoting organic or animal welfare labelled products, they do feature as an issue in the supply network.

In terms of contractual relations, there are two points of negotiation:

1. between farmers and processing industry;
2 between manufacturers and retailers.

The price the farmer gets is set by a political administrative decision to ensure target prices for farmers are met. These annual negotiations decide the maximum and minimum between which market prices can vary. This annual process leaves little incentive for manufacturers or retailers to integrate vertically with primary producers since no price advantage can be achieved. Long-term relationships between major retailers and suppliers are implicit and formed through joint marketing investments from the industry, ranging from listing fees and payment for category captaincy to shelf placement agreements that improve supplier status and tie retailers to a select number of manufacturers. These practices illustrate that retailers do have a power that manufacturers and industry pay to take part in. Gilde is the primary producer in two of largest retail groups – Norgesgruppen and Coop with a stake of 58 per cent.

Improvements in on-farm animal welfare are not the responsibility of quality assurance schemes such as KSL (Quality Scheme for Agriculture). Instead, 'ethical accounting' is carried out by an advisory board for animal health, which does not have the ability to enforce but only to advise. National breeding associations such as Norsvin, the pig farming association, control the genetic code for the breeding and insemination of sows. Their influence among their 2100 members is used as a mechanism for upgrading quality standards of production among members through courses and seminars. Participants receive a diploma, but these improvements do not feature in certification schemes in food supply. Hence, there is no way for manufacturers and consumers to know if farmers are participating in courses and, consequently, there is no economic incentive. However, the 2001 Plan for Action on Animal Welfare has gained support because pork is vulnerable to the threat of foreign imports. Lower welfare requirements for pigs and chickens in the Europe Union implies that both sectors want to be in the forefront of improvements. It is widely regarded that improved welfare increases productivity and, consequently, farmers whose animals show signs of poor welfare are punished with price deductions. Investment in animal welfare has led to substantial rewards described as a ‘very strong, win-win situation improving animal welfare’.

Conclusion

Despite the absence of a retailer/supplier drive to improve pig welfare, since there is no way to differentiate the market by product labelling, improvements in pig welfare are taking place indirectly in the domestic market through the breeding association Norsvin; tist appears to be the most influential, motivation in the market. Norsvin’s programme could become accredited at some stage in the future. Outside of the conventional distribution system, there exists a small amount of organic pork as well as Grostad Gris (which is an explicit welfare product).

12.2.3.3 Dairy Sector

Tine has the largest share (93 per cent) in the dairy market; Q-Melk is the next contestant. There are a few milk supply network schemes in Norway, yet Debio is the only one that maintains a presence through the value chain, with a label actually carrying the name Debio on dairy products; the others are silent schemes.

- 48 per cent organic milk is sold as organic.
- 51 per cent organic milk is sold as conventional.

Since 2001, there have been increases in demand for liquid organic milk, yet demand for the further refinement of organic milk has not increased accordingly across the Tine range – organic semi-skilled milk, organic Norvegia milk, organic Norvegian cheese, organic fruit yoghurts, organic sour cream and organic Kefir (sour milk).

In 2003, Tine introduced a new brand concept, ‘Ostecompagniet’, with the aim to put in focus speciality cheese and other niche products. Taste, region and animal welfare feature in the marketing. Its other product line is Tine-organic, which is responsible for 2 per cent of sales (all sour milk production is now organic, which could be responsible for this sale figure). Similar packaging is used across all ranges.

Tine’s organic dairy products are seen as animal friendly. There is a dilemma about promoting organic products as animal friendly, which is related again to how the cooperative model hampers attempts to segment product lines based on quality because it suggests conventional is worse. This explains why Tine is mainstreaming organic milk with an implicit value of welfare friendly, without communication that it is better or more animal welfare friendly.

Organic processed diary products are effectively ‘on hold’ for the following reasons:

- it is difficult to create more refined milk products, because there is a shortage of other organic ranimal welfare material;
- limited by Tine’s centralized infrastructure.

Yet, farmers are moving into organic for commercial reasons, and there is a growth in the number of organic consumers, including not only the affluent. However, there is resistance to develop the organic market by the breeding organization and the sales cooperatives; consequently, they are failing to meet the interests of both ideological consumers and ideological farmers. The history of organic milk illustrates the reluctance for segmenting the milk category into conventional and organic. In 1993, Tine promoted organic milk not as Tine but as ValleyFarm milk (a product different and outside of Tine). Yet, a change in category management in 2001 let to it returning under the Tine family, uniform product-labelling approach, thus mainstreaming organic production.

Conclusion

Organic dairy products are now mainstreamed by Tine, they can be labelled organic but this labelling is not backed up by statements explaining why it is a higher quality product; it is left to the knowledgeable consumer to read organic as higher quality. Tine’s belated move into organic milk shows that it is not a strategic driver, nor for the retail chains that stock the product. Instead, the authorities have a political, economic and symbolic role in naturalizing the process of increasing organic production by promotional strategies.

12.2.3.4 Beef Sector

Gilde is the largest organic livestock producer in Norway. They hold 50 per cent of the beef market, much of which is organic, supported by the ‘whole chain agreement’.

The ‘Gilde Organic Meat’ brand is based on beef products. The Organic Consumer Association (OIKOS) have accused Gilde of being slow in developing organic products. Currently, only 25 per cent of organic products are sold as organic, the remainder goes into the conventional product stream. This is seen as a major hindrance to the goal of increasing organic production and consumption. Gilde is developing products with Coop that will be promoted in specialist and weekly publications. Coops goal is to reach full distribution of fresh organic meat to the largest outlets, Coop Mega, and also to smaller shops with positive attitudes towards organic production.

Like in the pork sector, the Norwegian authorities are the driving forces behind new production methods. Gilde has no animal welfare strategies, its standards are 'good enough'. The logistical side of organic meat is challenging, separating organic from conventional in the slaugherhouse. First category organic meat is subject to special regulations and requirements concerning animals food and rearing. There is a 1 NOK price premium if there is demand in the market.

Gilde is obliged by the authorities to take part and increase the supply of organic products. Gilde never portray themselves as a driver for organic products, yet they have become the largest actor of organic meat in the market. They have changed their communication to consumers and category management. They now carry nine different organic beef products, packaged as standard Gilde products (a similar strategy to Tine's mainstreaming of organic products). There is promotional material for Gilde organic meat. Animal welfare is indirectly included in the marketing of the products through the use of the phrase 'natural behaviour and needs'.

Conclusion

Gilde's new strategy presents organic as more animal welfare and more natural fodder. The division among producers has been overturned through the 'whole chain agreement'. Therefore, the authorities are supporting the 'artificial' pull by way of the cooperative strategy for full distribution. The authorities are working with supply networks, supporting primary producers, running products and campaigns, and encouraging push/pull relations between large actors in the value chains. The naturalizing of organic in Norway happens through the activities of the authorities. Plus, it becomes a lever for improving animal welfare in Norway. This will perhaps stir a response from producer cooperatives to improve communication of already existing initiatives and schemes in the conventional supply networks.

12.2.4 What Is the Potential Norwegian Market for Welfare-friendly Products?

There is greater compliance to regulation in Norway than there is elsewhere in Europe, allegedly. There is a mono-culture in the meanings of animal welfare. In the value chain, retailers decide on price, whilst manufacturers market own brands as value brands. Equality is an extremely important value in Norwegian culture. There is an 'imagined sameness' even where difference exists. For example, three different types of milk quality exist, but to label one A and one B does not fit with the cooperative model. A new product line is called 'Sans', and it is promoted as 'healthy products for you!'. The 'for you' is significant because it deals with the challenges of differentiation. Tine does not sell its organic range as better for animal welfare, whereas Gilde does (which is a new approach).

Why is the processing industry – the key actor for animal welfare – an obstacle to improvements?

1. Farmer cooperatives are integral to the system.
2. Farmer cooperatives have individual market power (exceptions are acquired and bought out with the agreement of the Minister for Competition, going against the recommendations of the competition authorities).
3. Manufacturer brands dominate the food market. Corporate identity is prioritized over product attributes. Animal welfare is a component of corporate identity and trust. Animal welfare is part of risk management. Abbattoirs are the main risk to food safety.
4. The Norwegian market of farm products is protected by import barriers. They do have differentiation strategies, which draw upon animal welfare, if the market is exposed to imports along animal welfare lines.

The only future for animal welfare is through differentiation along 'individualistic value' lines. Organic lines through Tine and Gilde and McDonalds have their own audit system.

12.3 UNITED KINGDOM

12.3.1 How Does the UK Animal Welfare Regulation and the Level of General Interest in Farm Animal Welfare Limit or Develop the Market for Welfare-friendly Products?

The UK agri-food industry has moved from being historically supply-led towards being demand-led. The main drivers have been the rise of the supermarket dominance of the food retail market and the resultant increase in their power to shape supply. Government regulation has also encouraged supermarkets to self-regulate quality in the supply network. The top four supermarkets (Tesco, Asda, Sainsbury and Morrisons) now have 75 per cent of the UK grocery market.

As the market share of the retailers has steadily risen in the last two decades, so have their relative 'power' in the food supply network. In practice, however, this power is far from unilateral or absolute. Retailers are 'only as good as their supply chains', and rely on supply network 'partners' to meet and indeed lead 'consumer demand'. The market has seen increasing retailer interest in forming partnerships with trusted suppliers and producer clubs in order to add value and differentiate their products from competitors. Other (ostensibly) non-market actors such as NGOs and government continue to play a large part in defining farm animal welfare concerns.

Quality Assurance Schemes have played a very important role in the development of the market for welfare-friendlier products. They were initially set up to assure the food safety standards of supply networks as part and parcel of the 1990 Food Safety Act and the need for retailers to show 'due diligence' in relation to food safety. However, they have quickly become vehicles for assuring wider 'quality' standards. The 'industry' standards under Assured Food Standards (AFS) are the most widespread standards in the UK. Other Quality Assurance Schemes of note are the RSPCA's Freedom Food and the various organic certification standards. These have been, and continue to be, used strategically by retailers in a number of ways. For example, Coop have declared support for Freedom Food as part of its wider 'ethical' stance and all the top four supermarkets, with the exception of Morrisons, only source from AFS assured suppliers in the private label fresh meat sector. Thus, they both protect their brand and promote the 'quality' of their products.

Government Regulation

The UK government follows EU legislation but have 'gold-plated' some legislation for UK farming. The ban on sow stalls and tethering is a well-known example of this. This is often argued to have unfairly disadvantaged UK pig producers vis-à-vis their European competitors. But it has also driven the search for 'added value' pig production systems (Freedom Food, outdoor bred, outdoor reared, and free range). UK retailers, whilst not sourcing all their pig meat from UK, have driven up standards in Denmark, the Netherlands and France ('UK contract' production systems).

12.3.2 The Current UK Retail Market for Welfare-friendly Products

Quality assurance schemes (QASs) have been integral to retailer-led structural changes to the meat/dairy/egg supply networks, in which many of the competencies between slaughter and packing have been incorporated into single firms. Each retailer usually has only 2–3 'key' suppliers (sometimes only one), which source meat according to retailers' specifications. In the UK, the 3 major retailers with a combined market share of over 60 per cent, source all their fresh meat, dairy and egg products from quality assured suppliers and producers. Reflecting this, producers primarily see QASs as guaranteeing market access. Retailers use QASs in two interlinked ways: to protect their brand by ensuring integrity of their products and communicating this to consumers, and to differentiate product ranges. The four main QASs in the UK, Assured Food Standards (AFS, an umbrella industry standard for the species-specific schemes operating at industry standard), Freedom Food (welfare specific QAS from the RSPCA), the Soil Association organic standard, and the Organic Farmers and Growers standard have developed different roles in the UK market. AFS is now industry standard: it guarantees market access rather than that it secures a market premium. Retailers generally use the AFS logo (a red tractor against a British flag) on all products that meet the standards. Organic standards and logos are used to differentiate organic ranges and have been very successful in securing a market premium. This is reflected by producers' motivations for working with organic standards, which include added premiums. Freedom Food has occupied a position between the organic and the industry standard. In the chicken and egg sector, it has been successful in forging a niche between conventional and organic, with an added premium. In other sectors it has been used 'behind the scenes' to ensure product and brand integrity, without the standard and its logo being communicated to consumers.

UK retailers, pioneered by Waitrose and Marks and Spencer, have started looking beyond 'generic' QASs to more 'bespoke' production systems (especially for 'added value' tiers), which reflect their brand and its ethical integrity. We see this as an important development, with partnerships being formed between producers, suppliers and retailers, which are seen as flexible and adaptive to consumer demand and have the potential to increase farm animal welfare standards.

At the same time, retailers also import significant quantities from continental Europe as well as globally. Most retailers insist on QASs, but the equivalence of non-UK standards has been called into question by UK producers, despite retailers' claims that they match UK standards. Thus UK producers are generally keen to see better labelling of imported (and hence, in their eyes, lower welfare) products.

In general, consumers show little awareness of quality assurance schemes. This reflects the retailers ambivalent attitude to QASs, and their focus on communicating brand values and quality tiering to the detriment of promoting third-party QASs.

What is important here is that there is currently no single definition of farm animal welfare, accepted by producers, suppliers, retailers and consumers, at work in the marketplace at the moment. And interestingly, the gap between producers' and consumers' views on what constitutes good farm animal welfare means potentially that there never will be nor should be. Having been given relative autonomy by the UK government, retailers are wary of being 'pinned down' to a generic European standard that will invariably be lower than the standards to which they already operate, and which their consumers expect.

Brand

In the UK, we have seen a lot of activity with regards to farm animal welfare within retailers' public relations/CSR reports. This has been pursued with varying degrees of proactiveness and coherence with other aspects of retailing (especially products on shelf). All the retailers interviewed use basic quality assurance schemes, AFS or EurepGap to control the integrity (that is, the quality) of all their fresh meat, eggs and dairy products. This both protects and reinforces the private brand, and underwrites basic quality claims. Some other retailers have linked their brand explicitly with animal welfare concerns: Marks and Spencer, Waitrose and Co-op, who have pledged support of the Freedom Food standard.

Assortment

Farm animal welfare is used to differentiate and market categories, ranges and products. The degree to which this is the case varies, both between and within retailers, and between sectors/categories due, in part, to historical particularities of supply and demand within each sector. It is, therefore, hard to generalize across all sectors.

Farm animal welfare has become an established means to differentiate tiers in some sectors common to all supermarkets. Explicitly, it is used to market barn and free-range eggs and free-range chicken (some development in barn/Freedom Food chicken and outdoor-reared/free-range pork), and as part of wider concerns within the organic tiers. With the possible exception of the egg sector, higher farm animal welfare standards are marketed alongside other 'quality' attributes to differentiate them from the 'standard' offers, and from equivalent offers from other retailers.

As well as 'generic' higher welfare products that have become an established part of some categories, we are seeing a general move towards more differentiated welfare claims as part of a differentiated 'quality' package. Waitrose and Marks and Spencer are the retailers that have taken this retailing strategy furthest in the current market, but the majority of the other retailers, including the big four, are following. The move towards 'bespoke', quality/value-added supply networks is based on greater vertical cooperation between actors in supply networks, which, in theory, allow for more investment and innovation, including farm animal welfare.

12.3.3 An Overview of the UK Animal-based Product Sectors

Egg

The egg industry in UK is dominated by Noble Foods, a merger between Deans Foods and Stonegate (the first and second largest egg suppliers in UK, respectively), completed in June 2006. They currently have a market share of around 60 per cent. The company stated the merger will lead to substantial savings in distribution and packing, which can free up capital that can be passed on to farmers for them to invest in the upgrade and expansion of 'added value' production units.

Coverage of the industry's national assurance scheme – Lion Quality – is high, with nearly 100 per cent for retail shell-egg production. Freedom Food standards covering free range has been successful and has been incorporated in Lion Quality assurance for free range.

The growth in non-cage shell eggs in retail has been rapid, in particular eggs from free-range systems. Estimates place the market share of non-cage shell eggs at just under 50 per cent by volume in 2006. Shell eggs are one of the most heavily segmented categories in UK retailing, with farm animal welfare an important component of differentiation; barn, free range, organic. EU legislation concerning labelling requirements for egg production (setting minimum standards for eggs to be labelled barn, free range and organic, as well as making labelling of 'caged' production mandatory) have been an important catalyst for sales as well as the general support of industry in promoting these higher value products.

> 'It would be wrong to say that our strategy is driven by animal welfare, but it certainly is our strategy to nurture and drive sales of free-range and welfare friendly products. We work very deliberately with those retail customers who have good sales in this sector, or wish to drive them. These customers would match our ambitions. We wish to be less reliant on cage produced eggs, which will increasingly become a traded commodity, where returns are high risk and difficult to forecast. Free range should allow us to deliver more consistent revenues and returns' (UK egg packer).

Example: ASDA free-range eggs

By value, free-range eggs account for 36 per cent of ASDA's sales, compared to cage egges produced at 41 per cent. Barn and organic eggs are 17 per cent and 5 per cent, respectively (TNS, 52 weeks to 28 January 2007). On the shelf, prices vary greatly. For one medium egg, cage starts at 6.7 p, barn at 14.3 p (both sold as minimum weight), free range at 14.6 p and organic at 24.2 p (prices correct as of 12 February 2007).

ASDA free-range eggs carry the Lion Quality logo and clearly state 'laid by hens free to roam on British farms in the fresh air from dawn to dusk' on the top of the pack. At the time of the market audit (11/2004), they also carried the Freedom Food logo. This has now been removed from packaging as it was thought to add little value, with low consumer recognition and loyalty.

To increase market share, ASDA and their supplier have been heavily promoting the benefits of free-range eggs; placing features in ASDA magazine and putting up shelf markers with information about 'ASDA's producers' and free-range conditions on farms. Asda has implemented volume driving promotions on free-range.

> *'Have there been specific price promotions on free-range?*
> Yes.
> *And that has been going on for a while?*
> Until only fairly recently, ASDA had a 'no promotions' trading philosophy. The theory was that monies invested in promotion was instead invested into consistent,

> lower, retail pricing. Over the last 6 months, this has changed and we have run a number of price promotions on eggs. Where we have good availability, we would try and undertake price promotions on free range. In the long run, it raises awareness for those who would not normally search out free-range' (ASDA egg supplier).

The higher margins on free-range eggs for retailers, suppliers and farmers are in a sense reliant on a 'value' product. In the UK this means caged. Within the UK market, this is the commodity product that all retailers compete on for lowest price offer. Free-range eggs have been seen as a differentiated product, with retailer buyers focused on differentiating their product in terms of quality not price. The egg industry is keen to keep full range of 'choice' for the consumer, and maintain margins on free range.

The market has seen further elaboration along welfare lines with the development of 'woodland' free-range production systems often using 'hardier' breeds more suited to the outdoor life.

There has been growth in a market for processed free-range egg (a market still dominated by caged egg), due to demand from retailers using free-range egg in processed foods – notably Marks and Spencer, which has used only free-range egg in all its products since 2003. Other retailers, such as Waitrose, Sainsbury's and Tesco, have been following this lead, particularly in their high quality ranges (Finest*, Taste the Difference). This demand has outstripped supply of second-grade free-range eggs (the natural supply of processed egg) and draw supply from first-grade shell egg, thereby ensuring prices of free range have remained high.

Poultry

The market for non-broiler poultry has been growing in the UK retail sector, although it does not account for more than 10 per cent of sales. There have traditionally been three tiers to the category's segmentation – broiler, free range and organic. This has been added to by the introduction of barn chicken – with lower stocking densities and enriched environment, amongst other measures.

Coverage of AFS is near 100 per cent of chicken found in retail.

Barn chicken was pioneered by Freedom Foods and Lloyd Maunder integrated chicken supplier. They developed a corn fed, 'Devonshire'-breed chicken now sold in many of the major retailers.

> 'They are barn chicken. The rationale for going with barn chicken was price. Essentially, we have standards for indoor chicken, for barn-reared chicken, as we do for free-range chicken. The issue was really to look at a gap analysis and say you have standard chicken, you have organic chicken, you have free-range chicken, now if we go for a free-range/organically type option, which is going to cost 8, 9, 10, 11

> quid versus £2.50 down here, it's a hell of a jump for people to move to there, so we specifically went for a barn option, which can be for a whole bird something like 75 p to £1 more. And we believe that those people within that standard group would be willing to take a £1 leap rather than not even consider doing it, so that was specifically why we've gone for that, which is to try and say you don't have to spend a fortune on welfare to make a difference' (Freedom Food).

And this attempt to add a further tier to the three established tiers is beginning to pay off, with Lloyd Maunder Freedom Food chicken currently being sold in Somerfield, ASDA and Morrisons.

Beef

The UK beef sector has enjoyed a renaissance in the last decade following the impact of BSE and the subsequent ban on the sale of cattle over 30 months-of-age. This has resulted in a dedicated beef herd being created rather than the older UK dairy herd animals entering the meat supply network. The UK beef industry has developed particularly along speciality breeds with aims to create a conformation of animal that satisfies the demands in terms of fat-to-meat ratio of a quality beef market. Animal welfare is rarely used to market beef, but 'grass fed' or 'carefully reared' terms that appear on quality meat products do suggest a higher degree of care for the animal.

Coverage of assurance is high but not as high as in other sectors. The major retailers use international QASs when importing beef (AFS or EurepGap). Both Scotland and Wales have been partially successful promoting their national herd along quality and safety lines (Scotch Beef by QMS and Welsh Beef). The English herd is equally promoted by the MLC and EBLEX. Many developments have occurred at the retailers' quality lines; for example, Marks and Spencer Aberdeen Angus beef (sold in both fresh and processed products) and Waitrose Hereford and Aberdeen Angus products – here specific production and processing criteria have been developed in order to sell high value, highly differentiated products.

Pork

The higher animal welfare legislation for pigs adopted in the UK (so called 'gold plating' of the new pig welfare legislation in the 1990) has seen the active marketing of British pork (by BPEX, the national statutory organization for pigs) as welfare friendlier than imported pork. In addition to this, across all retailers we have found 'outdoor reared' used as a marketing term to suggest a higher quality pork product. In some retailers 'free-range pork' is sold.

The pig industry in the UK is fairly consolidated with the top-four suppliers covering the majority of production. Coverage of QASs, in particular AFS, is high in British pork production (near 100 per cent for pork sold in the major retailers). Demand from UK retailers has seen the development of ‘UK contract’ farms in Denmark, the Netherlands and France, which are audited to ‘UK standards’.

The following example highlights the development of high quality, high welfare production systems that are being developed by UK retailers and their suppliers

Example: Waitrose Pork

Waitrose and their supplier BQP/Dalehead have recently reviewed their on-farm requirements [codes of good agricultural practice, GAPs], including their animal welfare components, for their pork. Their category has been rationalized into three tiers: BLEP/LINK, free range and organic. For each line, they use specific breeds/crosses that are deemed best adapted to the particular production conditions. BQP have an in-house vet who monitors the performance of their farms closely, and each farm is audited under AFS and Freedom Foods.

Their basic offer – ‘Farmhouse’ pork, which was established as early as 1983 – became BLEP, Basic Level Entry Product. Within these requirements, the pigs are ‘outdoor bred, outdoor farrowed and then they come indoors for fattening’, without growth promoters, with specific herd plans, access to straw, etc.

Free-range pigs are outdoors throughout their entire lives until slaughter. A number of specific criteria have to be met. These include: no growth promoters, specific herd plans, access to straw, the use of a traditional breed exclusive to Waitrose – the ‘Hampshire’ – and all pigs have to be grown in two UK counties. This allows Waitrose to market specifically their ‘bespoke’ supply network on the product packaging.

Organic pigs reared to Soil Association standards are bred, weaned and finished on single farms. They are weaned at six weeks (two weeks later than BLEP and free range) and are a specific cross that is specially suited to an organic, free-range production system.

Over the last 20 years, Waitrose have developed a supply network that is built on ‘tripartite’ relationships between producers, processors and its buying and technical team – a ‘vertical partnership’ allowing for innovation and differentiation.

In terms of farm animal welfare, this means that producers, BQP/Dalehead and Waitrose have been able to develop a production system that has ‘high’ animal welfare and quality credentials, which are a real point of difference with the more ‘generic’ pork on offer at other retailers.

Dairy

The milk industry at the manufacturing level is consolidated, with the top three, Robert Wiseman Dairies, Dairy Crest and Arla, sharing the majority of the market. Milk has been seen traditionally as a commodity product, with the UK dairy sector enduring huge price pressures from the retailers. Coverage of the QAS (NADFAS) is very high, but there has been very little differentiation in conventional milk. This is slowly changing with retailers setting up contracts with exclusive 'producer groups' through favoured suppliers. This has the potential to provide a platform for innovation at the production level to be translated into more differentiated products on the shelves. This innovation may include farm animal welfare characteristics.

In contrast, the organic milk sector, although enduring problems related to over-supply and under-supply, is now in a strong position and uses animal welfare as a marketing feature. The organic milk sector is characterized by a stronger cooperative structure, with OMSCo holding about 60 per cent of market share.

Yeo valley, manufacturers of yoghurts, ice creams, milk, butter and other dairy products, are the highest profile organic dairy brand. They actively use farm animal welfare as part of the marketing of their products.

12.3.4 What Is the Potential UK Market for Welfare-friendly Food Products?

Farm animal welfare, when used explicitly by retailers, tends to focus on naturalistic and extensive notions of welfare – for example, straw-bedding and free range. Even if standards (both industry and retailer) specify much more, retailers find it difficult, unrealistic or counter-productive to convey a more complex and nuanced picture of farm animal welfare. Retailers are wary of generic standards for animal welfare; they understand the need for legal minimums but want space to innovate and differentiate. As outlined above, 'consumer' understandings of animal welfare and, therefore, retailer interest in new production standards, may be at odds with the industry's more 'health'-focused definition of farm animal welfare.

Labelling is an EU competency and one that is extensively reviewed in the present period. Many welfare organizations, including the official farm animal welfare council see clear and informative labelling as a key factor in promoting the market for higher welfare-friendly food products. The example of the legislation of labelling of free-range eggs, on both packaging and the egg itself, is cited in support of this argument.

Free-range development in the egg sector began life as market initiatives, developed and marketed according to individual actor's definitions, which coalesced into industry consensus. Free-range production has been formalized into law by the EU, so that all eggs labelled free range must come from production systems with certain minimum standards.

This tightening of labelling laws has also increased the market for free-range eggs, as consumers recognize and trust products with greater ease.

12.4 THE NETHERLANDS

12.4.1 How Does Dutch Animal Welfare Regulation and Level of General Interest in Animal Welfare Limit or Develop the Market for Welfare-friendly Products?

The Dutch government has a special department responsible for animal welfare, the Department of Animal Production and Welfare of the Ministry of Agriculture, Nature and Food Quality (LNV). This department is responsible for legislation covering farm animal welfare.

For most animal species, EU regulation is the basis for Dutch regulations. Different species are kept for different reasons and in different circumstances, which is reflected in legislation. In the case of pigs, for example, Dutch regulation is much stricter on certain aspects than EU regulation prescribes.

During the late 1990s up to 2003, Holland's ruling coalition made farm animal welfare a priority. At the end of their reigning period, after a period of economic growth, the policy document 'Houden van dieren' (i.e. 'Keeping animals' and/or 'Loving animals') was formulated (http://www.minlnv.nl). It stated that the Netherlands should be a precursor of animal welfare policy in Europe. The policy was to go purposely one better than the European directives.

In May 2003, a cabinet of Christian-democrats and liberals was formed. The economic tide had turned and this cabinet made economic recovery its priority. Under the new minister, Veerman, farm animal welfare policy was recalibrated. The curret strategy is a level-playing field, with the focus lying on improving welfare standards on an international level. The government leaves initiatives to improve animal welfare up to the market, but facilitates (research) projects.

The General Inspection Service (AID) is the inspection and investigation leg of the Ministry of Agriculture, Nature and Food Quality and polices compliance with the Ministry's rules and regulations. Its activities can be divided up into inspection, investigation and verification of documents. Skal is the organization that has been directed the responsibility for the inspection and certification of the organic sector. Legislation is decided upon by the national government, in consultation with enforcing bodies and industry.

12.4.2 The Current Dutch Market for Animal Welfare-friendly Products

About 70 per cent of all food and tobacco products in the Netherlands are sold in the traditional retail channel and 30 per cent in the out-of-home channel. Within the traditional channel, supermarkets are responsible for the majority of the food sales, about 75 per cent. For many food products, such as eggs and fresh meat, about 80 per cent is sold in the supermarkets.

The retailing industry in Netherlands is fiercely competitive, with most competition focused on price. The growth of discount stores in the Netherlands and the repositioning of the market leader Albert Heijn has led to a price war between retailers. All competitors reacted by lowering prices several times. The severity of this price war is demonstrated by the collapse of the retailer Laurus.

One way to finance the lower prices in retailing is through trying to buy products at a lower price. Albert Heijn, for example, informed their suppliers by letter that Albert Heijn expected the supplier 'as an important partner, to contribute to this investment', and thus they were expected to lower their prices as well. A severe price war will always lead to price pressure at the farmer/producer end of the supply chain. Pricing, however, is only one of many criteria on which retailers actively compete; others include the location of the stores, additional services provided, product assortment, and quality of goods. The latter two are of particular importance for understanding the marketing of animal welfare-friendly products. Farm animal welfare becomes mobilized to a greater or lesser extent, and more or less explicitly, as a component of product (and assortment) quality.

The visions of various retailers towards consumers vary too. In general, retailers think that animal welfare is not a primary concern for most consumers. However, those retailers at the full-service, high quality end of the spectrum do see their consumers to expect farm animal welfare 'to be taken care of', to be implicit in their choice to shop with them. This is supported by findings from the market audit and various reports from NGOs; it is shown that the number of welfare products differs per animal product type. These reports show a distinction between discounters, value-for-money retail chains and full-service retail chains. In the interviews, these differences are observed as well, though with some nuances.

Organic products, fair trade products and products with welfare claims tend to have market shares of about 5 per cent maximum. Often this is attributed to the notion that consumers are deterred by the higher price. Products with animal welfare claims are generally more expensive than their regular counterparts. The origin of this price difference was also a topic in the interviews. According to the interviewees, the costs can be divided into four parts: higher producer costs, balancing the carcass, the logistical process and higher retail costs.

Animal welfare is a topic that has received a lot of attention in Dutch society as well as in the world of retailing. NGOs have been active in this field since the 1980s, campaigning/lobbying both government and supermarkets, and using the media effectively to get their message across. The NGO 'Wakker Dier' (Awakened Animal) campaigned against (individual) retailers in order to protest against the presence of cage eggs in their assortments, with the result that a self-imposed ban was adopted on fresh caged eggs across the whole retailing sector. The Association for the Protection of Animals takes a less confrontational approach, working directly with the retailers – for example, in the development of a more animal-friendly housing system for pigs.

12.4.2.1 Organic

Bio+ is a brand name for organic products that originates from organic meat products. The traditional organic butcher 'De groene weg' (literally: The Green Way), part of Dumeco and currently under the flag of Sovion, used to own the brand name. VION is a subsidiary of the Dutch company SOVION, whose shares are held by the Zuidelijke Land- en Tuinbouworganisatie (ZLTO). The ZLTO represents the interests of livestock farmers and market gardeners in the Dutch provinces of Noord-Brabant, Zeeland and Zuid-Gelderland. The organization has approximately 19,000 members, of whom some 12,000 are agricultural businesses (http://www.vionfood.com).

In 2005, a new foundation was erected to manage the Bio+ brand. In March 2005, it was announced that the brand name Bio+ was extended to be an umbrella name for all organic products, with further development in new product groups such as dairy and fresh products such as fruit and vegetables. The independent Bio+ Foundation now has the possibility to give licenses to use the Bio+ brand.

Bio+ is a brand for organic products, which means it has to be certified by Skal, the Dutch inspection agency for organic production. Only after Skal has certified a company, the EKO-logo can be used on packaging. 'De groene weg' has a specialized traditional organic butcher product line. They see organic products as originating from farms 'where animals have been able to enjoy a freer existence without the intervention of artificial products' (http://www.dumeco.com, accessed 16 May 2006). Dumeco carries out its own quality inspections as well.

Most supermarket chains are too small to manage an organic brand themselves as, for example, Albert Heijn and Super de Boer do. The smaller supermarket chains can use Bio+ as an answer to Albert Heijn's organic brand, which has market share in organic sales in Dutch supermarkets of about 70 per cent. Making Bio+ an umbrella brand and selling it at various supermarket chains has several advantages: it is beneficial to have joint promotions, logistical costs are lower, and the image can be improved due to widespread distribution.

12.4.2.2 Retail Strategies and Farm Animal Welfare

CSR

Animal welfare does have a place in the corporate social responsibility (CSR) strategy of the major retailers, particularly at the 'high end' of the spectrum. Laurus was in the process of developing an ambitious CSR strategy, which included animal welfare. Royal Ahold has an extensive CSR strategy, which takes farm animal welfare into consideration. Many of these strategies take into account global sourcing policy, which in the Netherlands, as in UK, generally takes the form of sourcing from suppliers and producers who are part of accepted quality assurance schemes. On the other hand, it can also take the form of product assortment and having welfare-friendly choices on offer for the consumer. Consumers may have a more positive attitude towards retailers that have a large assortment of animal welfare products compared to those that do not have these products (Sen and Bhattacharya, 2001). Of course this only works as long as the product is not sold at a constant loss.

Farm Animal Welfare as Part of Product Quality

In line with the other study countries, Dutch retailers see animal welfare not as a primary concern for most consumers. It may play a role, but the product has to meet other conditions first:

> 'The consumer has several expectations. First, a product has to be safe, he simply assumes that. Next, his purchases based on past experiences, he liked something. Then price plays a role at some point. Subjective elements like animal welfare, organic, etc. come after that, I think. If you would do a survey on the street right now, I think people will find it really important, but if you do the same thing the moment the consumer is standing in front of the shelf, it becomes a different story' (value-for-money retailer).

One of the biggest barriers Dutch retailers see in the expansion of the market for farm animal welfare-friendly products is price. In the majority of cases, animal welfare alone is seen as an insufficient means to differentiate a product on quality and, therefore, to convince consumers to pay a premium for it. For this reason, we see farm animal welfare being bundled into wider quality attributes regarding taste, environment, farmer welfare and so on.

Quality Assurance Schemes

The quality assurance scheme is the primary means by which quality is constructed through the supply network and is communicated to consumers in the Netherlands. Most schemes are reactions to random events or shortcomings of the market. In the case of veal, producers reacted to problems with calves in boxes. The projects of the Association for the Protection of Animals fill the gap between regular and organic products, as does the Albert

Heijn 'Scharrel' chicken. Differences occur between schemes about the welfare conditions that are communicated. Some schemes are specifically set up for animal welfare purposes, others seem somewhat reluctant to communicate about animal welfare.

The majority of retailers are not active in setting their own criteria of food products for suppliers. Albert Heijn is the only retailer that sets up its own schemes (Greenfields, 'Scharrel' chicken). Super de Boer has an organic line under its own brand; however, the own brand does not require additional demands other than the mandatory EKO-logo. Most retailers do demand that suppliers are part of certification schemes such as BRC and IKB, or equivalents.

As some retailers are too small to invest in their own schemes, cooperation is sometimes sought with other retailers and chain actors. New products are launched, and private schemes are set up in cooperation with authorities on issues such as animal welfare or the environment. The 'Farmer's Chicken' (see Section 12.4.3) is a good example of this kind of initiative.

Dutch retailers as a whole support the EurepGap as a means of assuring basic quality across their (international) supply base.

Own Brand

Some of the major retailers, in particular Albert Heijn, have developed own-brand ranges into 'quality' products beyond the 'value' offer traditionally associated with own brands. As these ranges are intimately bound up with the retailer's brand, farm animal welfare often features (in tandem with other attributes) as part of this quality and hence the brand. Albert Heijn Greenfield's beef and Scharrel chicken are very good examples of this.

NGOs

Animal welfare and animal rights NGOs have played a very important part in both raising awareness of farm animal welfare issues and encouraging and developing alternatives to 'unfriendly' production. For example, the Association for the Protection of Animals is involved in several projects of animal welfare-friendly production systems. One project, the so-called 'Comfort Class' housing system, is an innovative system that takes into account the welfare of the pigs. Another is the 'Farmer' slow-growing chicken developed in association with the Southern Agriculture and Horticulture Organization (ZLTO) and Coppens Animal Feeding, with interest shown by retailers, in particular Jumbo.

Market Drivers

One common denominator of the Dutch supply networks studied here is that there seems to be one strong actor in each chain that directs the scheme. These can either be retailers

(Greenfields, Scharrel chicken), producers (Alpuro, Ecomel) or wholesalers (Grass Eggs); at some point in the network the decision is made to set up welfare conditions. The actor will evaluate the chain and manage the conditions (if the requirements are not imposed by law). The presence of a dominant player in the chain seems to be a must if the product is to succeed in the (super)market.

Promoting Welfare Products

The emphasis of promoting products in retailing is on price promotions. All retailers state that they have price promotions with welfare products (usually organic). Sales of these products rise significantly when they include promotions. Retailers use price promotions in combination with advertisements to encourage sales of, for example, organic products. Price promotions are an effective way to achieve this goal. The ultimate goal is to evoke a trial of new consumers and to retain these new consumers. The latter seems harder to achieve, as sales drop again when the price discount is over. Some retailers do notice a slow increase in sales after price promotions. Price promotions are often financed through lowering the margin on products. Structural discounts are not feasible, as this is too costly. Moreover, if you translate a price discount of, for instance, 25 per cent to a structural discount, prices could only be lowered modestly (up to 5 per cent). The effect on consumer sales of this discount is expected to be low. The Ministry of LNV is currently researching the effect of price discounts. In 43 supermarkets in the Netherlands, prices of organic products are lowered in order to find the turning point for consumers. The CBL is participating in the project.

Other ways of bringing animal welfare to the attention of consumers are also evident. The market audit has already shown that some retailers have in-store communication about animal welfare. For example, point-of-sale advertising of Bio+ was present at Plus supermarkets (through flyers, posters). Albert Heijn has national TV-commercials to promote organic sales (in combination with discount prices). In a more passive way, some retailers' internet sites also communicate about animal welfare (Albert Heijn, Jumbo) or about organic products in general (Coop). Communication about animal welfare is most likely to increase, as several supermarkets will introduce welfare products and others have plans to make their CSR policy transparent.

Some retailers talked of the need to 'educate' the consumer. In many ways, the strategies presented in the previous paragraph are 'constructing' an ethical consumer who will pay more for welfare-friendly products.

The Dutch Market in its International Context

Some actors share the vision that animal welfare is an issue only relevant in the local (Dutch) market but hardly an issue in international trade. In European and global trade, constant product quality and safety are more relevant. The higher regulations under which Dutch producers operate are seen in some senses as a disadvantage and, thus, some advocate a 'level playing field'. This was seen either to be the responsibility of the EU or of the market itself. The latter option is, in a sense, one of the motives behind membership of EurepGap.

12.4.3 An Overview of the Dutch Animal-based Product Sectors

Eggs

As mentioned above, animal rights/welfare NGOs persuaded retailers to stop selling caged shell eggs on a voluntary basis. In the Netherlands, 80 per cent of consumption eggs bought by consumers are 'scharrel' eggs. Arguably, the majority of consumers think that 'scharrel' is a free-range egg with outdoor access, as 40 per cent of the Dutch consumers stated that they buy outdoor eggs (Eurobarometer, 2005). 'Scharrel', however, is a barn egg. Outdoor-reared free-range eggs only have a market share of about 2–3 per cent. The most well-known outdoor egg is the Grass egg.

The Grass label is controlled by an independent foundation. It was founded in 1993 and the first grass eggs were sold by Albert Heijn. It is produced to regulations that are stricter than the EU rules for free-range outdoor. It was also developed beyond the product group of eggs – for example, for pork, beef, and poultry products – but these products are rarely found. Grass eggs carry the IKB free-range logo (EU conform) controlled by CPE (Control Office for Poultry, Eggs and Egg Products). In addition, the independent Grass logo is on the packaging.

The central actor in the chain is the packing station. In the Netherlands, there are five main packing stations, of which three primarily act on the Dutch market. Packing stations handle a variety of egg types (ranging from cage to organic) and brands (for example, corn eggs or Grass eggs). Packing stations have short-term sales contracts with retailers (1–2 years), usually including multiple types of eggs in one contract.

Veal

The most interesting part of the veal network is that the two main companies (VanDrie Group and Alpuro) are completely integrated in all aspects of the supply network; feeding, breeding and processing are done within the same company, so cooperation and control are optimal. The advantage of fully integrated supply chains is that innovations are relatively easy to implement. In this case, welfare monitoring and/or improved welfare standards can be implemented top-down from stable to final packaging. Both Alpuro and VanDrie already work with integrated quality schemes.

Alpuro have developed Peter's Farm veal, a product with specific welfare claims on the market in the Netherlands and UK.

Dairy

There are two main dairy cooperatives – Royal Friesland Foods and Campina – which hold a majority of the market share for dairy products (the majority of which is further processed into butter and cheese).

Campina has a separate business unit for organic dairy. This business unit, Ecomel, has two separate brands for organic products: 'ZuiverZuivel' (literally, PureDairy) and 'De groene koe' (literally, The Green Cow). 'ZuiverZuivel' is aimed at health and health-food shops, 'De groene koe' is aimed at supermarkets.

Beef

Most of the beef on the market is derived from the ex-dairy herd and, therefore, is subjected to similar QAS, including organic. The quality of the sector is mainly filled by imports. A good example is Albert Heijn's own Greenfields brand of Irish beef.

Ireland has the image of a country with a widespread green landscape. Greenfields captures this image in its beef products. Setting up a supply network has the advantage that management is in your own hands. It is an open system that farmers meeting specific criteria can join. Producers are obliged to work according to certain quality schemes. For Northern Ireland, these are the requirements of the Beef and Lamb Quality Assurance Scheme, operated by the Livestock and Meat Commission (LMC). In the Republic of Ireland, the quality demands follow the Beef Quality Assurance Scheme. The former one is checked according to international norms (EN45011), the latter will be soon. The two schemes are ech other's equal.

Albert Heijn launched a website for consumer information, looking in more depth at the Greenfields products. The five freedoms are mentioned as the basic requirements. Other issues that are handled are: traceability, animal health, feeding, animal treatment, environment and transport. On the website, the Association for the Protection of Animals compliments Albert Heijn for Greenfields beef, as it almost meets the requirements for 'scharrel' meat (free-range) and approaches organic norms.

Pork

The Dutch pork industry is one of the biggest net exporters of pork meat in Europe. Production is characterized by highly productive, intensive production. Several actors in the pork chain cooperate in a project to improve welfare for pigs. Notably, the Association for the Protection of Animals is involved in several projects concerning the welfare of pigs. One such project is the so-called 'Comfort Class' housing system, an innovative system that takes into account the welfare of the pigs. Various actors in the sector have taken the initiative to develop an economically viable alternative for the regular housing system. Comfort Class does not represent a welfare-friendly stable, but part of a search for affordable comfort for pigs (http://www.comfortclass.nl).

The national Agriculture and Horticulture Organization and the Dutch Association for the Protection of Animals are the initiators of the 'Comfort Class' project. The Association for the Protection of Animals is following the example of the RSPCA, by being actively involved in the development of welfare-friendly products and sustaining these initiatives up to the retailer shelf.

Chicken

At the time when the Welfare Quality® market audit was performed, Albert Heijn had Loué chicken in its assortment: a chicken from the French region Loué. These hens live at least 84 days (depending upon the race) and have outdoor access. Albert Heijn decided to remove this product from its assortment, partly due to difficulties in contacts with the supplier. They decided to set up a private label, independently certified by Label Rouge. This so-called Farmers 'Scharrel' chicken is currently in stores, it was found as chicken filet and a whole chicken. The packaging refers to the outdoor access the chicken has (note: 'scharrel' in eggs does not mean outdoor access available). The name of Albert Heijn is not mentioned on the product packaging. The label communicates the following product attributes:

- fed with 100 per cent vegetable raw material, minerals and vitamins, of which 75 per cent grain;
- lived at least 81 days;
- farmers keep scharrel chickens in an outdoor-access system.

The Association for the Protection of Animals (Dierenbescherming), the Southern Agriculture and Horticulture Organization (ZLTO) and Coppens Animal Feed are developing a production network for a slow-growing chicken, the so-called 'Farmer's Chicken', along the lines of the Freedom Food chicken in the UK. This product is available in three supermarket retailers. Jumbo is one of the retailers that showd interest to introduce this product (Anonymous 2006a).

12.4.4 What Is the Potential Dutch Market for Welfare-friendly Products?

There are contrasting notions that the Dutch agricultural sector is aware of public debates about animal welfare: the topic receives attention yet a common definition of what animal welfare is, should be or ideally is, is hard to uncover. Various respondents have said that they encourage science to come up with objective measures rather than the subjective perspective of animal welfare that is present currently.

Several retailers stated some conditions that should be met at least by an animal welfare monitoring scheme. These are:

- no emotional or subjective aspects should be incorporated;
- the parameter(s) should express something about the entire life of the animal;
- it should be a testable monitor.

Other actors

- A 'level playing field' should be the starting point. As most producers operate across borders, they prefer equal standards in each market. International differences lead to competitive issues.
- Striking differences are seen between sectors as well. The veal sector has transferred to incorporate animal welfare in their communication of their quality product. On the other hand, the pork sector is still regarded as a commodity market, driven by efficiency. They regard welfare monitoring suitable especially for a niche market. Compared to pork, for example, the dairy sector holds a more positive image with consumers, partly due to the many cows in Dutch fields. They regard monitoring to be a challenge within the Netherlands. In the poultry sector, quality schemes are incorporated into most companies; hence, a welfare index would fit in with existing schemes. In other sectors (veal, dairy), it is stipulated that a new hallmark is not desirable.

Also, retailers were asked how a monitoring system should be illlustrated.

- 'Not like a thermometer, but rather like a set of standards: basis, plus, superplus. The underlying details should be thoroughly sustained' (Coop).
- 'It should be easily understandable. A traffic light doesn't seem proper. Perhaps an energy meter like in the white fabrics? Or a hallmark, but that has to be simple and applicable to multiple product categories' (Jumbo).
- 'A logo is one option. But if everyone cooperates with EurepGAP, it doesn't have added value; a tick or something like that, I do know why we should want that' (C1000).
- 'I'd prefer one umbrella label that replaces existing ones' (Laurus).
- 'Like an energy label, then you can leave the choice to the consumer' (Superunie).

12.5 FRANCE

12.5.1 How Does French Animal Welfare Regulation and the Level of General Interest in Animal Welfare Limit or Develop the Market for Welfare-friendlier Products?

In France, the general public shows relatively little interest in animal welfare (except for a few animal protection associations). This may explain why French regulation follows European legislation but does not go that step further.

French meat and animal production conform to base-level legislative standards. It has to because in an 'Etat de Droit', legislative requirements are seen as legal requirements. Where producers may not be conforming they are acting illegally. And yet the assumption amongst all actors that base-level legislation is enforced by law (because of the Etat de Droit) has meant there has never been any justification for a label or certification scheme to indicate simple conformity to this legislation. Thus, all certification, assurance and so on where it exists is always seen as part of quality segmentation – that is, over and above mere conformity to legislation. Although France is always associated with certain types of quality labelling/certification/assurance (such as AOC), this in fact has been, until relatively recently in the case of animal products (with the exception of cheese), the exception rather than the rule. In particular, it was the BSE crisis in the 1990s that led to the dramatic increase in quality labelling and its use by supermarkets in both product segmentation and product traceability.

In fact, the main concerns of French consumers are about food quality, and that is why we have so many quality schemes aimed above all at improving the taste, and the added value, of some products. Hence, uptake of the use of 'base level' quality assurance schemes to cover conventional production is low.

In contrast to the other countries under studied, quality schemes are often regulated by the state, the Ministry of Agriculture in particular. There are four main types of official quality approaches.

- 'AOC' (Protected Designation of Origin) guarantees the place and the methods of production of traditional products, negotiated with producer groups. Welfare is clearly secondary in these approaches.
- 'Label Rouge' (Red Label) focuses on high, distinctive quality. 'Label Rouge' in pig, eggs and chicken production gives a certain priority to animal welfare, in particular to free-range production, or straw bedding. However, the final objective of the schemes are quality of food rather then animal welfare.
- CCP (certified products) certify some technical aspects of production supply, and welfare is low priority.

TABLE 12.1 Amount (by volume and value) of certified and assured products sold in supermarkets and other outlets as proportion of total

	Quantity(tonnes)			Value000 €		
	Total production	Production under certification or assurance scheme	%	Total production	Production under certification or assurance scheme	%
Meat (beef, pork, mutton and lamb)	5,354,700	576,700	11	121,264,400	1,917,900	15
Poultry	1,819,600	249,710	14	4,528,900	643,900	8

Source: AGRESTE, 2004.

- 'Agriculture biologique' (organic agriculture) is mainly based on European regulations, but with a few specific aspects, and welfare is important.

Amongst the certifications of conformity (CCP), there is a significant range of schemes. Many of these are *not* labelled as such but serve to guarantee traceability within the food network and, crucially for agro-food network actors, to differentiate these products from 'standard' products. They are increasingly used by supermarkets as entry points though not universally.

Amongst the most common CCPs are VBF (Viande Boeuf Francaise) and the VPF (Viande de Porc Francaise), which certify that the animal is born, raised and slaughtered in France. Created in 1996 during the BSE crisis, the VBF has become one of the most common base level certifications for supermarkets. Certain supermarkets use their own CCP schemes as entry points (notably the beef products Jean Roze, operated exclusively by Intermarche, which has been developed between the supermarket and the butchers group SVA-Jean Roze and is essentially an own-brand VBF certification).

There are also a number of market-based quality assurance schemes, ranging from retailer led to producer led (ranging from small producer group schemes to sector-wide schemes). With the exception of Thierry Schweitzer pork, none of these schemes are exclusively addressing farm animal welfare.

The extent of products carrying welfare claims was found to vary considerably both within sector/category and regionally within France, using the whole range of QAS and labels outlined above.

12.5.2 The Current French Market for Animal Welfare-friendly Products

12.5.2.1 Retailers

There was a huge growth in the large French retailers' (that is, supermarket and hypermarket companies) share of the grocery market in the 1980s and 1990s, with a corresponding decline in small retail outlets. This resulted in the French government moving to protect small retail outlets through legislation (for example, a ban on TV advertising for multiples, which has just been overturned). As with other 'mature' retail markets, the rise to dominance of large retailers ushered in an era of major change in French consumerism and the in agro-food industry.

> 'A relatively small number of companies, predominately those operating major supermarkets and hypermarkets, are controlling a growing share of the market and increasingly the food chain itself, from food production, processing, retailing to marketing and sales' (Roe and Murdoch, 2006).

The rise of the 'hard discounters', both the foreign-owned ones and their more recent domestic competitors, was marked by a growth from 1 per cent of market share in the early 1990s to 8 per cent in 1998; this has also had a major impact on the French food retail market, competing aggressively with the established large retailers over price. This has led many towards strategies of differentiation focused on quality and service aimed at redefining 'value'.

Animal welfare is being adopted as a criteria of brand and product differentiation (though rarely explicitly and never solely) within the major supermarket retailers as part of a broader strategy of differentiation that distinguishes the products available in such stores (and hence the stores themselves) from those sold by the 'hard discount' retailers. If the latter are making serious inroads into the profit margins that supermarkets obtain from standard, bulk and basic products, then the 'quality turn' of many major retailers (Cora, Monoprix, Carrefour, and so on), which as we have seen can incorporate welfare criteria, is becoming a clear strategy of differentiation – as seen in brand ranges such as the Monoprix Gourmet range or Carrefour's Filière Qualité Carrefour, and assortments boasting regional, quality products such as Thierry Schweitzer pork and Veau d'Aveyron. Although this 'quality' turn should be seen in the context of predominately non-assured, undifferentiated meat, eggs and dairy categories in the major supermarkets.

12.5.2.2 Wider Market

Three (inter-related) characteristics of French food industry have an important bearing on the market for farm animal welfare-friendly products.

Regionalization and Federalization of French Retailing

Although a consolidated sector, the major French retailers maintain strong federative and regional approach. Retailers have differing degrees of supply network autonomy for individual stores and regional groupings. This autonomy seeks to actively embed the supermarket company in the local region by favouring a range of locally produced foods. The current study has found that farm animal welfare, in certain cases, has been actively promoted as part of the regional distinctiveness of the products concerned (for example, Thierry Schweitzer and Veau d'Aveyron).

The Importance of the Filière

A characteristic of the French food retailing sector that bears upon the current analysis is the importance of the filière, or food supply network, from farm to retail outlet. This is represented institutionally by the relatively high number of cooperatives that not only operate within the production sector but also, such a in the cases of Sodiaal and others, within the manufacturing and transformation sectors, providing a significant counterpoint to the growing power of the retailers. In addition, many of the larger retailers themselves, most notably Leclerc, have grown out of these production and manufacturing sectors and retain close links to them. Hence, there are many more cases of brands and assurance schemes being developed in liaison between producer groups and organizations, on the one hand, and supermarkets, on the other, than we might find in other European countries. A number of the product filières examined here have been so developed, with the assurance scheme rules being jointly negotiated to the mutual benefit of retailers, manufacturers and retailers. These relations are also visible in the overall ethical positioning of quality marketing, which often incorporates agrarian discourses whose objectives include the 'welfare' of the farmers and the rural/agricultural communities as much as, if not more than the welfare of the farm animals. Indeed, the search for a certain communality and harmonization in the operation and values associated with the filière, its products and its procedures has, we believe, limited the degree to which welfare-based product segmentation has been allowed to develop. This is particularly evident in the highly integrated veal sector, which found itself especially threatened by the welfare debate (along with other health and hygiene issues) in the early 1990s. The veal sector has nevertheless responded, perhaps more significantly than any other sector, by greatly tightening up its welfare rules and achieving improvement in its image across the board. This improvement however, is threatened by welfare-related product segmentation. If some veal farmers, or producer groups, seek to market their product by incorporating additional welfare standards, the implication then becomes that all other production is welfare deficient, an image the veal sector is very keen to avoid.

Terroir and Quality

The French conception of territoriality is imbued fundamentally with a sense of those intrinsic natural and cultural components that make distinctive food products. In the minds of many French consumers, certain regions of France are associated with 'quality' gastronomic products and 'quality' breeds. Again, the 'welfare' components of this notion of 'quality' are held to be implicit, sometimes going beyond the need even for specific quality labelling such as Label Rouge. For beef and lamb products (such as Aubrac beef), this makes the commercialization of welfare-friendly production systems relatively straightforward. Not only do those extensive systems conform fairly readily to consumers' notions of animal welfare, but complying with charters and assurance schemes can involve little, if any, additional cost. However, it is problematic for those sectors that have neither a specific regional implantation nor are able to draw upon specific rustic breed types. It is these systems that require more contrived and innovative displays of distinctiveness. The Route du Lait provides one very good example of how a new (and entirely artificial) territoriality has been constructed for produces in otherwise indistinct production regions. Free-range pig production in the Limousin is another example where production method (rather than spatiality) is used to create a difference.

'Terroir' labels are seen to address the interests of

- consumer trust;
- environmental concerns;
- retailers, in their search for 'quality' products;
- producers keen to add value to their products;
- French government keen to see endogenous quality food networks replace exogenous state funding as the motor for rural development.

12.5.3 An Overview of the French Product Sectors

Pork

The French pork sector is dominated by standardized, intensive production. With a national pig herd of some 15 million animals on some 46,000 pig farms and an annual production of 25 million animals. It is a net exporter of pork, with little imports entering the domestic market. Within national pork production in France, organic pork represents approximately 0.2 per cent of the market. Label Rouge pork accounts for some 1.2 per cent while quality assurance schemes cover approximately 34 per cent of pork produced (figures for 2003). Regarded as the 'poor man's meat', this sector is characterized by a relative homogenous commodity product with little differentiation along quality lines. The most differentiation is present in the further processed category, in the hams and saucissons. Retailers say that demand for organic and Label Rouge fresh pork is very inconsistent.

An example of a successful Label Rouge pork product is Limousine free-range pork (Plein Aire). It is produced under two distinct regulatory regimes, both of which represent the possibility of considerable added value. The first of these is the Label Rouge designation for Limousin free-range pork; the second is the EU PGI designation, for which Limousin free-range pork is one of only three pork PGIs in Europe. Significantly, the development of free-range production was not driven by animal welfare considerations per se, even though these have subsequently become a critical part of the product's distinction (and commercialization). Free range was seen as a potentially lower-cost option in terms of building investment at a time when changing EU and national rules were demanding substantial changes to the methods of pig breeding and, particularly, in stocking densities and space minima. The Porc Limousin fermier (free-range) Label Rouge is commercialized under a range of names and categories so as to minimize internal competition within the production sector and to multiply the retail opportunities. Hence we can distinguish:

- 'Porc fermier du Limousin (Label Rouge, PGI)', the term used within the major hypermarket and supermarket retailers;
- 'Cochon Paysan', name used when sold through traditional butcher shops, where it is sold as Label Rouge but not PGI;
- 'Gustou', a product name launched in 2001 by BEVICOR, which again refers to the Label Rouge criteria but not the PGI and contains the words 'Respect: Traceability: Quality' on the label accompanied by an anthropomorphized pig preparing a dining table.

Both the producer group who developed the product and the retailers who sell it say that it is the higher gustatory quality and 'naturalness' that sell the product rather than animal welfare standards per se.

Egg

There are a number of parallels between the egg sector and the pork sector. Like pork, eggs are perceived as being relatively homogeneous – one egg tastes much like another. Like pork too (see above), animal welfare has emerged as a significant element of product segmentation and the creation of additional margins for food network actors. Finally, both the egg and pork sectors have faced, over the last 20 years, a number of specific welfare and hygiene crises linked to intensive methods of production. Both retain the image of indoor, battery production.

Pork and eggs have long been seen as 'basic' and undifferentiated by breed type, by zone of production, by local traditions and savoir-faire. For food network actors, such homogeneity presents a challenge to more profitable segmentation, leading to a number of different approaches.

Organic and Label Rouge (which cover both free-range and barn systems) are well established ranges in all the major retailers. New product based around 'health' such as Omega-3 enriched eggs have begun to be seen on the market.

Although 'alternative' egg production systems have made a huge impact on egg sales, battery eggs still dominate the market. Finally, because of the relative lack of processing and transformation, the majority of eggs (around 60 per cent in France) are sold under supermarket labels.

Chicken

Poultry presents strong differentiation along quality lines, with a strong presence of Label Rouge products and organic ranges. One good example is Vie Claire's (an organic retailer) own label Poulet Noir Fermier. Originally, a single producer proposed the supply of organically certified Poulet Noir to Vie Claire from the Vendee region. Vie Claire responded favourably, knowing that the product was distinctive in character and in the extent of its welfare conditions.

> 'The producer proposed a slow-growing breed that was considerably slower (91 days) than is standard for organic production (81 days). This is a very limited sector of the market and the extra 10 days makes a real difference. The meat sells at a higher price than the 81-day organic chicken, but it also has particular organoleptic qualities' (retail manager).

Farm animal welfare, assured through organic certification, becomes one of a bundle of qualities (chief amongst which is superior taste).

Beef

The beef sector in France is still recovering from the 'mad cow' crisis of the 1990s. Since the late 1990s, actors within the sector have struggled to regain public confidence in beef. The beef sector can be roughly divided into low quality products derived from the dairy herd and high quality, highly differentiated products derived from specific breeds of suckler herds. Label Rouge and AOC/PDI certification abound within this high quality sector. One good example is Monoprix Aubrac beef. This is certified to the retailer's own quality assurance scheme for its 'Gourmet' range. Aubrac beef is supplied by a large and multi-membership producer organization known as 'L'Association Boeuf Fermier Aubrac', which is composed of six producer groups, including the CEMAC with 158 member farmers, the Bovi Plateau Central with 149 farmers. In total, some 450 farmers are associated with the organization, though a larger number are involved with Aubrac husbandry in the larger region. Strict breed criteria must be applied and the system consists of 100 per cent extensive, natural grazing.

For Monoprix, Aubrac beef represents a superior quality product that associates taste and gustative quality with notions of 'terroir' and upland, mountain rurality.

> 'Our strategy has been to propose a segmentation based upon two types of meat: a standard (low cost) beef derived from ex-dairy cows and a high quality beef product coming from identified groups of producers from a particular area with a particular breed. Furthermore, it has been Monoprix that has gone out and sought such a product' (Beef category manager).

This product highlights the strong partnerships between retailers, processors and producers in bringing a quality product to market and, within this setting, how farm animal welfare standards operate.

Dairy

Dairy farming in France is generally undertaken in relatively small, family-owned farms with a regular rhythm of work dictated by the necessity of milking twice-daily. The cooperative movement is very strong within the dairy sector and Sodiaal, as one of the largest agro-cooperatives in France is very much characteristic of this form of local/regional cooperative organization, coming together into a larger, national structure.

The nature of the dairy sector distinguishes it from other sectors examined here. First, the structure of the production sector of the supply network is fundamentally different with the absence of the critical producer/abattoir–processor link that so characterizes meat networks. This effectively strengthens the representative power of the producer groups, particularly when organized into cooperatives, with respect to negotiations with distributors.

As milk is a basic product that, like eggs, offers no great variability in taste, marketing is the key to any segmentation. Again like eggs, milk – as a basic and homogenous product – is one in which hard discount stores offer strong competition to supermarket and hypermarket retailers. The only real segmentation within the milk market is between skimmed and unskimmed products (the latter divided into semi and full cream, though the latter represents a very small part of the market today). Because of the largely predetermined nature of the market, producer groups and cooperatives seek to influence retailer buying desks more that they seek to directly influence consumers.

> 'With a banal product such as milk, you have to create your own difference and this is what we have done with 'Grandlait'. You have 'Candia' and then the 'Grandlait' brand, which represents a particular approach. This has enabled Candia to be present where they weren't present before. Candia has followed our approach at the beginning as they had to get a major retailer interested by getting their buying people out to the farm and identify what they might be interested in' (Production manager, milk cooperative).

12.5.4 What Is the Potential French Market for Welfare-friendly Products?

1. A change in what is quality. It is apparent that the nature of what constitutes product quality is shifting in France. As European and national legislation governing environmental impacts and animal welfare increases, conformity to conventional

base-line standards becomes insufficient as a qualifier of product exceptionalism. In the quality assurance schemes developed by the supermarkets studied here, and in the prescriptions associated with Label Rouge and other national certification schemes, additional standards (which are not always 'higher' standards) are becoming more commonplace. Although specific additional animal welfare standards are not necessarily included in the assurance and certification schemes, there is often an implied welfare component associated with the standards that are prescribed – for example, grass-fed grazing animals imply outdoor rearing, at least for part of the year.

2. A strong presence of producers in defining product quality (which includes farm animal welfare) through diverse QASs. This is synonymous with highlighting the importance of the filière and terroir in the French marketplace. As such, there are diverse constellations of production systems and quality assurance schemes, in all of which producers hold an important position. In some highly integrated and consolidated sectors, such as veal and pig production, these are predominately industry wide (with interesting exceptions), while in others they are very much more fragmented, highlighting the uniqueness of particular products rooted in their geography and tradition (for example, the beef sector).
3. A strong presence of government in defining particular 'quality' labelling in particular Label Rouge.
4. Consumer demand and brand management. The food crises of the 1990s and early twenty-first century have had a major impact upon marketing and commercial strategies of retailers and other food network actors, and have formed the context within which the 'quality turn' of the major retailers should be seen. A great deal of information is now available to consumers on the feed given to farm animals and on the length of life (particularly for poultry, far less so for beef cattle). Although the bulk of our interviewees consider that consumer anxieties are rarely driven by concern for animal welfare per se, there is a perceived association between healthy (and 'happy') animals and a healthy product. Animal welfare is increasingly being incorporated into discourses of sustainability, for example under Carrefour's 'Agir' ['Act'] slogan. However, since their clients often see retailers as merely large grocers and food stores, the notion of a corporate ethical position is, we would argue, underdeveloped. For the moment at least, Monoprix, Leclerc and others present themselves as serving their clientele, rather than leading them in any ethical or moral sense. Having said this, animal welfare is increasingly being taken on board as a necessary component of retailer (and manufacturer) quality branding (whether or not this is communicated to the consumer in the label) and that this involves increasingly going above minimum statutory requirements. This is true for both retailer own-brand quality labels and producer/manufacturer labels.
5. Product differentiation and quality construction. The major retailers, for reasons outlined above, are actively seeking to grow the quality ranges of their assortment. More common has been the commercialization of specific pre-exising quality products that are either proposed by the producer or manufacturer or are sought out by supermarket buyers – often in the interest of promoting regional embeddedness. As such, these products are generally sold under the manufacturers' or producers' labels (Grandlait, Thierry Schweitzer) rather than a specific retailer brand, or they

can be marketed using a combination of the two (as is the case for the Veau de Vitelliers). The production prescriptions are usually predetermined (sometimes as part of existing Label Rouge certification), although these can be altered and improved upon as part of subsequent labeling, certification or branding. Where this takes place, animal welfare criteria are usually added or reinforced. Certain retailers (Carrefour and Monoprix in particular) have been innovative in seeking out local productions in order to create a specific quality product. Using their own assurance schemes, often developed in partnership with the producers and thereby avoiding existing quality schemes such as Label Rouge and selling under their own specific brands ('Gourmet' and 'FQC'), they have introduced or formalized welfare prescriptions into the supply network as part of a set of generic quality components, frequently linked to the more consumer-friendly notion of environmental sustainability. Thus, the growing involvement of retailers in the establishment of quality assurance schemes and own-brand marketing is having clearly an overall effect of raising the standards of food production, particularly within quality product ranges. While this may be driven partly by the need to distinguish themselves from the hard discount stores, and while this does not necessarily extent to all products, the fact that Carrefour and Monoprix are moving inexorably towards 100 per cent quality product marketing does place these retailers in a key position for raising the general quality of animal husbandry.

6. French notions of quality. Most definitions of 'quality' mobilized by market actors centre around perceptible differences – in short, differences in taste. Interestingly, where welfare-related segmentation has proved more dynamic, it is in three product sectors otherwise characterized by relatively standardized and undifferentiated (at least in terms of quality) products: eggs, milk and, though to a lesser extent, pork. The inference here is that welfare can become an element of segmentation where there is little else (in terms of appealing to consumer choice) to differentiate the products.

12.6 SWEDEN

12.6.1 How Does Swedish Regulation and the Level of General Interest in Farm Animal Welfare Limit or Develop the Market for Welfare-friendly Products?

'Sweden is a society characterized by high levels of trust in the institutions of government'. Ensuring high levels of farm animal welfare, along with more general concerns for 'safe and sound' food, is seen to be the responsibility of the state. The Ministry of Agriculture is responsible for agriculture, environment, fishing, animal welfare and consumer issues. With respect to farm animal welfare, the Ministry covers standards of production, breeding, veterinary care, transportation and slaughter, as well as labelling. The Ministry has a dedicated Swedish Animal Welfare Agency that is responsible for the central control of animal welfare matters in Sweden. They work closely with industry, in particular the Federation of Swedish Farmers.

The inspection of production, transport and slaughter is the joint responsibility of county and local administration and the National Food Administration. Since 2001, a representative of the Ministry has to be present at slaughterhouse.

Farm welfare standards are generally seen as high by consumers, government and industry.

> 'As far as animal welfare is concerned, Sweden is the best regulated country in Europe. If all other countries had the same animal welfare standards as Sweden, the issue would be problem free' (Buying manager, meat category).

To a large extent farm animal welfare is a non-competitive issue within Swedish retailing, driven as it has been by the state. But since opening up to the Common Market in the early 2000s, this has started to change changing.

Animal welfare movements seem to be seen under the guidance of Astrid Lingbern, who did much to raise the profile of farm animal welfare. Media do still focus on farm animal welfare, with one recent current affairs programme 'Uppdrag granskning' unearthing bad practice at slaughterhouses and the failures of the community inspection system.

12.6.2 The Current Swedish Market for Welfare-friendly Products

Swedish agriculture, including livestock production, has a strong cooperative structure. The vast majority of farmers (over 90 per cent) are part of the Federation of Swedish Farmers (from now on referred to as LRF). All LRF farms are audited to EurepGap standards as well as to Swedish legislation.

Processing/Manufacturer Brands

There is a large market presence of farmer cooperatives at the processing/manufacturing level. Swedish Meats (owned by LRF) supplies 80–90 per cent of Swedish beef and pork sold in retail. Their brand 'Scan' is the best-known meat brand, sold by retailers, catering and food service. Arla Dairies are owned by Swedish Dairy Farmers and control the largest share of the dairy market.

In terms of food safety, the supply networks are closely monitored using HACCP, BRC. They are also working closely with retailers on ECR initiatives, looking to increase traceability and quality control.

These processing companies and their brands are powerful market actors. All retailers work closely with them but have little influence yet on development of retailer-specific differentiation (see below). The highly consolidated nature of the processing industry means there is very little incentive to differentiate on any 'quality' grounds, in particular animal welfare, because of its potential negative impact on 'non-quality' offer and overall sales. However, there is an expanding organic production sector, with an overall 'ethical' niche, which is seen to (implicitly) to include farm animal welfare. There are specific animal welfare developments in the egg sector (for example, indoor and outdoor free-range eggs) and in the dairy sector, with the 'cow barometer' developed by the Swedish Dairy Association.

Retail

The Swedish retail sector is high concentrated, with the top four retailers representing 96.1 per cent of food retail:

ICA	49.6 per cent;
Coop	21.5. per cent;
Axfood	16.7 per cent;
BergendahlsGruppen	8.3 per cent;

The Danish hard discounter Netto entered the market in 2002, and the German hard discounter Liddle in 2003. These retailers, with their slimmed-down, price-focused retail strategies, have started a 'price war' in Swedish retailing, with repercussions for the whole supply networks.

Quality assurance schemes are mainly focused around food safety – BRC, HACCP, ECR systems. When product is being sourced internationally, EurepGap or another QASs are used.

Swedish food retailing is dominated by federative organizations. This federative structure makes it possible for individual store managers to retain a fair degree of autonomy in meeting local demand. This is argued to mean these organizations are predominately conservative: a more forward thinking central office has more limited influence on product provision, category management and development of retailer-own label. Hence, this federative structure is seen as more market driven (reactive) than market driving (active). But this can act the other way – for instance, store managers have a remit to source local products, which give market access to small firms who do not have the current capacity to operate at a national level.

There are also significant differences between retailers:

> 'In essence, ICA is starting to resemble a traditional chain, with its strong central office and a store level structure that largely implements a centrally-decided strategy.

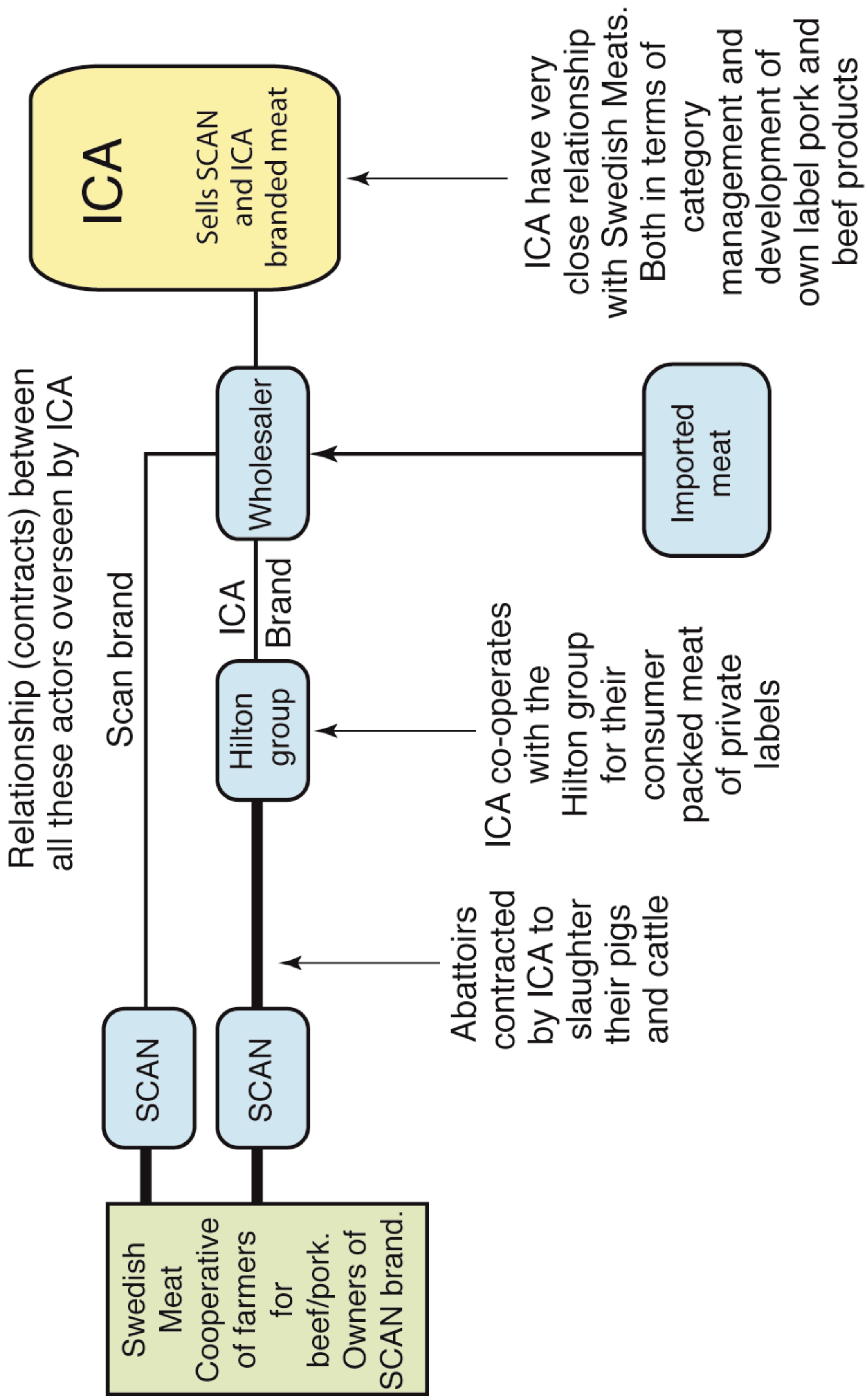

FIGURE 12.1 Pork and Beef ICA supply network with Swedish meats – SCAN branded products.

> Since 2000, the Dutch firm Royal Ahold became a co-owner of ICA and this has further heightened centralizing tendencies' (Murdoch, 2005).

All retailers seem to be moving towards a more format-orientated organizational structure, with greater control by central office. This has resulted in greater pressure to provide a coherent assortment in all the stores belonging to the same format group.

12.6.3 An Overview of Swedish Product Sectors

As we have seen, the meat, dairy and egg sectors are dominated by farmer cooperatives (Swedish Meats, Arla and Kronagg, respectively). All retailers have contracts with the same suppliers who work to set farm animal welfare standards:

> 'In Sweden, everyone within the food industry works by the same rules. As such, there is no competitive advantage in choice of supplier and we all, anyhow, buy meat from the same supplier' (Buying director).

Beef and Pork

Swedish Meats supplies all the major retailers with both their own branded – SCAN – products and retailers' own brands. SCAN products have a large market share, part of their brand image being the high animal welfare standards that Swedish farmers and slaughterhouses work to. They also produce and market organic KRAV-labelled products for all the retailers. However, Swedish retailers do have (limited) reasons to drive further the issue on animal welfare-friendly products – for example, the ICA private-label beef Sunda Naturbeteskött [Naturally Grazed Beef]. As ICA is the market leader in Sweden, they are very powerful and have the power to make producers concerned about an issue in the supply network.

> 'We don't work with suppliers that cannot live up to our demands [...] and if we should find out that a supplier doesn't follow our policies, he will be thrown out of the supply chain. We don't hang around' (Buying director).

Beef is imported into the country. Here retailers find it difficult to actively differentiate their Swedish products on animal welfare grounds, because it calls into question the quality of their imported products.

> 'I would not consider to communicate that one product that we sell in our store would be more welfare friendly than the others. Because then I would have difficulties to defend the rest of the products sold. We need to have some common Sweden standards for that to happen. We cannot go against Swedish law. If you turn

> the discussion the other way around […] there are many authorities involved […] Margareta Winberg, our ambasador in Brazil, speaks very well of the beef from Brazil. It is all about politics, each step is important for the business […] Nowadays, we visit each country, plant, from which we import meat to assure quality according to Swedish regulations for animal welfare. We need some kind of Swedish animal welfare standard to help us measure animal welfare on foreign markets, but personally I think that will never happen […] and we are not strong enough to drive the issue by ourselves' (Business unit manager).

Egg

The egg industry in Sweden, dominated by Kronagg, in line with developments in the rest of Europe, is differentiated along farm animal welfare lines. They sell caged, barn, free-range and organic (KRAV) ranges. Kronägg say that free-range eggs are not selling well. The producer group has to take the producers' interests into consideration; their interest, of course, is sales figures that indicate their profitability. Consequently, they cannot focus on marketing, for example, eggs from free-range outdoor hens, if that doesn't generate significant profits. The issue is more about how to increase the consumption of eggs in general. This is due partly to the difficulty of marketing free-range as 'better' welfare, particularly for a company that represents all producers:

> 'It will be hard to label products with animal welfare per se, because one needs to understand the difficulties in grading animal welfare in terms of good, better and finest. Animal welfare has to be animal welfare, and in Sweden where everything already is highly regulated (secured as safe and sound) I believe it will be very hard to get through to the consumer with that kind of communication strategy' (Sales manager Kronägg).

We do find more explicit animal welfare initiatives emerging in the market, especially from the small producers who are not part of the large cooperatives and who sell into regional stores (role of the federate retail structure in allowing these contracts to be possible).

Chicken

A good example of differentiation by small-scale producers outside of the cooperatives is Bosarpkyckling chicken. This is an organic chicken with specific farm animal welfare standards and explicit claims in the marketing of the product, with statements like farm-breeding in small groups, Sweden's probably best and KRAV authorized abattoir, free-range and mobile-houses and no antibiotics. It is produced on a small scale: 600 chickens a year. In this product supply-network, the powerful message of animal welfare is seen working throughout the entire supply chain. Bosarpkyckling has a contract with the retailer Coop and some local contracts with store merchants within the quality profile Malmborgs – part of the ICA federation.

> 'ICA at central level don't give a damn!' (The owner of Bosarpkyckling/Producer).

Dairy

The Swedish dairy industry is dominated by Arla, the Swedish dairy farmers cooperative. The Ministry of Agriculture, the producer group Swedish Dairy Association and the Federation of Swedish Farmers [LRF] are the drivers of the key mechanisms behind how animal welfare is handled within the supply chain of Arla. However, this does not mean that Arla does not show full responsibility all the way through the supply network, but what it does mean is that in Sweden even a producer like Arla, through its production, follows regulations of the institutions of government. Arla controls all feeding stuffs used by farmers to maintain high quality and allows no use of manure coming from purifying plants. Every other day, Arla takes samples for analysis of the milk. The important point here for animal welfare production is that a strong relationship exist between the producer group Swedish Dairy Association and their members Swedish milch-cow farmers. The association has through a research programme, 'the Cow-Barometer', contributed to improve marketing of the added value of Swedish milk production – that is, welfare-friendly production.

12.6.4 What Is the Potential Swedish Market for Animal Welfare-friendly Products?

In general, we see little evidence of the market differentiating products because of the lack of competition on farm animal welfare criteria:

> 'Swedish retailers do not perceive animal welfare as an independent concept that can be used to build and gain market share.'

This can be explained by the following factors:

1. The Swedish state has a strong role in regulating farm animal welfare. Most sectors of Swedish society consider that the legislation is at an adequate standard. Consequently, retailers do not have any grounds on which to act competitively with each other over farm animal welfare or, in other words, it is a non-competitive issue in Sweden.
2. Large producer-owned processing companies dominate the Swedish retail market. This has several implications for how the retail market is structured and consequently innovations in product development. a) There is little incentive to differentiate on

quality as this may negatively affect the sales of 'conventional' products, and thus overall sales of products that are part of ones product portfolio. However, the expansion of organic production is an exception to this – in fact, organic illustrates to Swedish retailers that it is possible to differentiate and not to lose out. b) The high number of manufacturer branded products provides little incentive for retailers to develop their own-brand ranges.

3 The Swedish market like other European countries is particularly reliant on imports because Swedish agriculture is by no means self-sufficient. However, Swedish retail culture is important here as it has a great reluctance to directly differentiate Swedish and imported products on 'quality', as retailers are keen to market themselves as only selling 'safe and sound' products. This is an area that may change as continual downward price pressure on suppliers/producers may force them to start differentiating their products to justify higher prices. Additionally, consumer concern may rise as the 'quality' of imports becomes an issue.

'There is a price war going on, and the pendulum is about to swing back towards high quality and added values' (Chief purchasing director).

4 Swedish retailers appear unwilling to take farm animal welfare as a marketing issue directly to their customers. This may be changing with a move to incorporate it, amongst other concerns, into their Corporate Social Responsibility (CSR) agendas and private labels; for example, Coop and their KRAV-certified ranges are not selling eggs from caged systems. There is a move towards more explicit CSR considerations and the development of own-label ranges (beyond 'me too' value ranges); this might develop into the market driving catalysts for animal welfare-friendly products. Swedish retailers talk of the possibility of using marketing to 'rais[e] the ethical level of consumer behaviour', which might open up a new market in premium products that could include higher animal welfare standards.

13

A SUMMARY OF MAJOR PAN-EUROPEAN BODIES AS REGULATORS AND/OR AS BODIES OF POLITICAL REPRESENTATION

EurepGap[45]

The private body was launched in 1997. It is an initiative by retailers who were part of the Euro-Retailer Produce Working Group (EUREP) and at the time consisted of mainly UK and Dutch retailers. It has subsequently evolved into an equal partnership of agricultural producers and their retail customers. Their aim is to develop standards and procedures for the global certification of good agricultural practices (GAP).

The main driver for these standards is to ensure food safety and quality in global supply networks. EurepGap has been developed to act as a commonly recognized benchmark for the various existing quality assurance schemes across Europe and the world. Originally covering only fruit and vegetables, the scheme has been extended to livestock production (amongst other areas), and requires standards just above the EU minimum.

Members of EurepGap Farm Assurance include: Ahold, CBL, Coop Switzerland, Delhaize, Kesko, McDonald's Europe, Metro Group, Migros, Sainsbury's, Somerfield, Tesco, Morrisons.

As membership expands, EurepGap will become an important driver for quality assurance throughout Europe and globally and, therefore, as a mechanism for ensuring and improving farm animal welfare standards.

EuroCommerce

Established in 1993, EuroCommerce represents the retail, wholesale and international trade sectors in Europe. Its membership includes commerce federations in 29 countries, European and national associations representing specific commerce sectors and individual

[45] EurepGap is known as GlobalGap from 2008 onwards.

companies. It is a lobbying organization, which aims to promote the interests of commerce in the European institutions. However, it is not, and has been not, involved in farm animal welfare legislation per se, with the exception of labelling.

> *Yes, so what is Eurocommerce's position on labelling and the EU's position, in general and in particular about farm animal welfare?*
> In general, harmonization of minimum requirements which are important for consumers, basically focused on ingredients and on the nutritional labelling. On sustainability and animal health they haven't taken this position, no. We see every now and then an attempt to bring those things up; for instance, the origin labelling for beef is one where we have said we can imagine that in many markets that is an issue, and the idea we have when they try to really have a coordinated approach which is feasible, which is commercially realistic and can be done, and so we try to steer that into manageable directions

Eurogroup for Animals

This animal welfare lobby group was set up 25 years ago by the RSPCA UK, in order to influence legislative action on animal welfare at EU level. Their interests cover farm, research and companion animal welfare issues. Eurogroup is now an umbrella organization representing animal welfare NGOs across Europe. These NGOs vary greatly in size and expertise and cover a wide range of positions on animal welfare/rights, but in general their position fits within the 'animal welfare' paradigm. Eurogroup has been influential in keeping animal welfare in the foreground in Brussels.

The Council of Europe

This is the oldest European political organization, comprising 46 nations. The Council of Europe has a Standing Committee for the Farm Animal Convention. This Committee was set up in response to the 1966 Brambell report, which introduced the concept of a 'duty of care'. The Council of Europe Convention on Farmed Animals introduced the 'duty of care' as a general directive and laid down what care meant, following guidance from Brambell. The Council of Europe then put this into legal terms and then it went back to the EU and became a Directive in 1968. Subsequently, this was incorporated into national laws; for example, it became UK law as the 1986 Agricultural Miscellaneous Provisions Act and became the 1999 Welfare of Farmed Animals Regulation. There is a Council of Europe Recommendation on each animal species, some of which is European Community law and some which is not. These are Statutory Codes not law, but they can be used in evidence to support non-compliance, so it is almost law.

The European Commission

Animal welfare comes under the remit of DG SANCO, the acronym for the Directorate General for Health and Consumer Protection.

Summary

These bodies work closely together in raising farm animal welfare standards across Europe as a whole rather than at the national level

14

HOW DOES GLOBAL TRADE AFFECT ATTEMPTS TO IMPROVE ANIMAL WELFARE AS IDENTIFIED BY RETAILERS?

14.1 EASTERN EUROPEAN MARKET

European retailers such as Ahold and Tescos have to deal with different levels of animal welfare across Europe and different levels of consumer concern for animal welfare, particularly with their new presence within the retail market of the Eastern European economies that only recently joined the European Union. These countries have attracted a lot of interest from the large multinational retailing operators, keen to get a place in this market, because the thought is that these economies are going to grow and that these people will have a lot of money to spend very soon, 'but the fact and the reality is not so easy' Ahold comments.

For example, Ahold comment that the market in

> 'the Czech Republic and Slovakia and Poland is such a different market than Holland, than Norway, Sweden, than the US – that's a bit of the problem with Ahold. Well, in reality this is difficult because you're dealing with different… animal welfare again… in the Czech Republic it is not so high as it is here in Holland or in Norway and Sweden and again it is different in the Baltics, because they have 100 per cent ownership of the supermarkets in the 3 Baltic states again. I mean, the awareness about all these sorts of issues is much less than here. It's a level playing field – everybody has to comply with this in order to be able to have the right to supply because we need to sell safe products to a consumer. But if you talk about everything that goes beyond that, all these other things like quality, welfare, sustainable fisheries, you name it, that's a different thing, and to some extent these things could also be used as a competitive advantage against other retailers. So in some areas you need to decide as a company whether you want to do your own thing or you work together with other retailers or other parties to run the show'.

14.2 BUYING GROUPS

There is a growing tendency for European retailers to buy together, to be able to create more purchasing power and, in the end, get a better price and better guarantees from suppliers. This is especially true in the non-food sector, where much is sourced from China, but this is currently less true for the food sector. It increasingly makes commercial sense to work through buying groups of different sizes and scales; there are also local buying platforms. These buying desks either work within one large retail group such as Ahold, Tesco, Carrefour, or as European buying platforms where a number of the retailers work together – for example, the Coops across Europe work together. However, the people on these buying desks work on price and, hence, the commercially savvy approach to improve standards is to aim for minimum levels to be accepted across the board so as to ensure that these standards are included in contracts – whether animal welfare or social standards. These trade conditions have to be communicated down through the Board of Directors to the Buying groups to ensure these minimum levels are met.

One European retailer commented about these buying groups and attempts to get compliance to minimum standards.

> 'It is communicated down [through the Board of Directors]. I mean, I don't know how much compliance because we have never been actually measuring that really seriously, but you would expect that if it's being communicated down that route, if they [the buyers] are still bypassing all of these sort of things and anyone finds out, me or locally, they have a problem, of course. I have gone so far from September to December, I have done a sort of inventory to see what are people doing actually? Because that is the policy, but are they actually really sticking to it? And of course, you see discrepancies in it because if you never really get your finger around it, they go adrift or whatever you call it, you know?'

14.3 COMPETING WITH REST OF WORLD

In general, we can find that European retailers and producers, by and large, support improved welfare standards, but they also need to remain competitive against imports from countries where standards may be lower. This is one of the greatest challenges about improving animal welfare standards across Europe, for the additional costs of welfare improvements need to be recovered from higher value sales (which we see through the quality-driven food agenda, which tiers products by quality), by subsidies or through trade measures. Third countries are actively encouraged to raise their standards to meet the requirements of European retailers through the use of EurepGAP. If third countries, where costs are lower, do meet European standards that makes it harder for European farmers to compete on these prices. One way in which European farming can be sustainable is if it offers something that non-European farmers cannot offer. What they could offer would be a part of the quality-driven food market, since they cannot compete on price; perhaps this would be a standard above EurepGAP.

For greater harmonization of standards to occur, a number of global bodies need to work together. These include the European Commission, the World Organisation for Animal Health (OIE), the World Bank and the Food and Agriculture Organization (FAO).

14.4 STANDARDS AND LABELLING

Is the use of labels on food products going to be useful in supporting European farmers and increasing farm animal welfare?

There have been meetings organized, such as the one in Brussels on animal welfare labelling in March 2007, held by the German presidency, to discuss this issue. What comes across loud and clear from the Commission at the meetings is the fact that there is a perceived need for an animal welfare label by the Commission themselves. The argument is that the EU should act as a model for the rest of the world on the question of animals, by saying farewell to farms where animals endure suffering. The success of labelling shell eggs – that is, a direct communication about the production system in which they have been produced – is seen as an example. However, there is little appreciation of the fact that the majority of the egg market in Europe is not made up of shell eggs, but liquid or powdered eggs. Thus, even in the countries that have the greatest uptake of shelled free-range eggs at retail level, this makes up only around half of the national egg production.

The DG SANCO Commissioner Kyprianou stated at the Welfare Quality conference in Brussels in March 2007 that

> '[a]nimal welfare should not be viewed as a cost but as an opportunity. Animal welfare is an opportunity for producers – its good for animal health, offers direct cost benefits in the long term. In Europe, farmers can compete on quality where they can't compete on price. EU consumers are interested in farm animal welfare, thus it makes sense to pair these dual issues together by introducing a labelling system that both helps European farmers and also enables European consumers to make ethical purchase decisions with greater ease and clarity' (paraphrased).

The attitude of the Commissioner to product labelling indicates how animal welfare features as a strategy to protect the commercial interests of European producers. The wish of the European Commission appears to be for animal welfare rules to become trade requirements for product being exported from and imported into Europe. The World Organisation for Animal Health (OIE) is already adopting some requirements that are perceived as biosecurity risks. It appears that the European Commission hopes that the WTO will allow Europe to impose ‘trade barriers’ in the form of animal welfare if it introduces its own – whether ethically or commercially driven? – perhaps in the form of a European animal welfare standard. The attitude of the Commissioner to labelling indicates how animal welfare features as a strategy to protect the commercial interests of European producers. The idea is that the EU sets up a reliable, uniform standard and tool to ensure compliance across Europe. With this in place, the EU will then lobby the WTO for farm animal welfare to become a non-trade concern, therefore allowing restrictions to be placed on imports of meat, dairy and egg that do not meet the EU standard or equivalent. This position says a great deal about how animal welfare is a commercial tool both at a global level as well as within the commercial strategies within retailers at national level or at category level as has been discussed throughout this report.

The World Organisation for Animal Health is currently the standard-setter for animal health; should it also become the standard-setter for animal welfare? If so, these standards would become the norm for trade rules.

14.5 GLOBAL POLITICS AND ETHICS

There is a wide variety of views about animal welfare worldwide. The EU sets high standards for farm animals but also permits things regarded by some as cruel – for example, foie gras, bull-fighting, religious slaughter, fur-farming. Many developing countries have high welfare standards, and certainly in many cases do not rely on highly intensive production. Where labour costs are lower and the climate is more suitable to free-ranging animals, animal welfare standards can be higher and at a significantly lower cost, thus it is wrong to assume that higher animal welfare is only possible on European farms.

The growing concern about climate change and the aims to lower carbon footprints in many ways drives the agenda towards animal production where the carbon footprint would be lower – that is, low-energy systems. In many ways, developing countries may support this form of agriculture, and thus they should be encouraged or helped to achieve high standards and they may be able to even profit by exploiting niche markets. Private standard organizations, such as EurepGap, can be a positive element in this area.

Humans also have rights, which may conflict with animal rights, such as in the case of religious slaughter or when food supply is limited. The EU must respect the ethics of other countries, but should maintain its own high standards. Geopolitically, however, the EU has reason to want to protect its own producers and remain a food-producing region.

However, price pressures from other parts of the world means that trade rules may be the only mechanism it can use to protect itself.

15

CONCLUSION TO PART II

15.1 SELLING ANIMAL WELFARE

Animal welfare is ‘sold’ in a variety of forms by retailers and commercial companies within the supply networks investigated in this research. For more details, see Chapters 10–12. In summary, there are three retailing practices that are key to the development of products that carry farm animal welfare claims.

Brand Management

Farm animal welfare is featured as a concern in brand management because of a need to protect the brand and to show ‘due diligence’ around food safety and quality in the supply network. Additionally, category assortment in the fresh meat category involves the careful positioning of own-label products against manufacturer/tertiary brands in various ways, with animal welfare claims featuring in segmenting the product category. Within own-label ranges, products are also differentiated in terms of quality and animal welfare claims are featured in this process of differentiating on quality.

Innovation within Supply Networks

The use of quality assurance schemes and/or additional production standards are a feature of some fresh product supply networks as there is a move both by retailers and by manufacturer brands to integrate their supply networks to be under single ownership and to develop bespoke, quality-driven supply networks that create a range of products or a product with a unique selling point by a particular brand. The activity, as an approach for innovating quality-driven supply networks, is along a spectrum from the proactive to the reactive.

Limitations to Supply and Demand

It is clear that the market recognizes that there are limitations to both the supply and the demand for products with improved animal welfare. The growth in the supply of welfare-friendly food products is restricted by uneven legislation on animal welfare across Europe. Additionally, there is a limit to the availability of capital investment to improve the housing of animals, animal husbandry training, etc. The demand for products that carry farm animal welfare claims or equally the demand within the supply network of animals that have met higher animal welfare conditions is limited by commercial considerations. These commercial considerations include the issue of carcass balance (finding a commercial home for all parts of the carcass). This issue is felt even more keenly when animals are bred to a higher specification – for example, higher animal welfare requirements that often result in higher costs. These higher costs can usually only be recuperated on certain parts of the carcass – the quality-driven market has not spread to all meat product sales. Another reason for demand to be limited is through the active avoidance of selling one production system as producing a higher quality product than another. This is a general rule but the use of greater description about how the animals have lived increases on products where production costs have been higher. Yet in Norway, where the development of higher cost production systems is subsidized, the manufacturer brands (run by the producer cooperatives) do not do as much as in other countries to promote organic products, which consequently leads to low sales figures and a significant number of organic products to be downgraded to conventional. Another example of supply–demand limitations is when a brand decides it wants to upgrade a certain part of its supply network – for example, moving into free-range eggs it is crucial that supply can meet the demand required, it is of no use having only enough supply to cover only half the volume of the range. Where there are limits to the availability of a product the potential to innovate is held back.

Farmer cooperatives play a very important role across a number of the countries studied, and this has developed to promote territorialization or national produce as a higher quality product. In some cases, higher animal welfare standards feature as an element of the higher quality product package. Where farmer cooperatives are linked with manufacturer brands through owning the manufacturing company, we see animal welfare being used more frequently as an approach to market produce – it is a way to connect back to the farming style/practices. Where this connection does not exist, however, it is rare to find manufacturer brands active in the market for products that carry farm animal welfare claims.

In summary, in all cases it is the creation of 'quality' through animal welfare that is the foundation of retail interest in animal welfare. Instilling quality in a product creates an ability to attain a higher price, it is a guarantee of a good product, the manufacture of a product that will not fail to impress the consumer.

1. Quality bundles a number of elements including animal welfare to attract people to spend more; importantly, we do not see animal welfare in isolation.
2. Animal welfare's inclusion within quality bundling is widespread across Europe and illustrates how a single-tiered animal welfare standard would be to the detriment of

improvements in farm animal welfare through the presence varying quality schemes and products. How can a product have a unique selling point if there is a level playing field?

3 Quality is not always engaged rationally but plays along ethical concerns and emotional and affectual sensitivities about what will interest and excite consumers. Different brands perform the notion of quality in different ways to distinguish their uniqueness; animal welfare is often included within the brand package.

4 A complexity to the development of a market for quality animal products is the uneven development in product ranges from different parts of the animal's body. Added value is lost from carcass sections that do not attract premium price strategies. Only some bodyparts of an animal that have had a better life will reach the shelf with a label that sells this fact.

15.2 ETHICAL MODERNIZATION

In the absence of a strong ethical consumerism, without a perceptible difference in product quality, market actors see no opportunity for a market segmented *solely* by welfare concerns, production systems associated with welfare are equally valued as traditional, extensive farming systems. Hence, for the majority of retailers, welfare needs to be bundled as a component of general product quality (a key element of which is gustative quality). This imparts an element of choice on the part of the retailer as to what components of quality should be made explicit and what components implicit. However, welfare is becoming increasingly adopted (and thereby increasingly necessary) as a component in a broader reconfiguration of notions of quality; this both in response to perceived consumer concerns but also as part of retailers' own commitment to 'quality' and the 'environmental' and other more overtly 'ethical' practices. Particularly in France (and Italy), the understanding of 'quality' is extending beyond the product to the entire network and the actors involved in it under a process of what we might term 'quality modernization', which incorporates elements of ecological modernization (through references to environment and sustainability) but also ethical modernization.

15.3 IMPLEMENTING HIGHER ANIMAL WELFARE IN THE SUPPLY NETWORK

Retailer initiatives concentrating on animal welfare standards are much more rare and concentrated across Europe; they are mainly found in the UK, and to some degree in the Netherlands. A dominant strategy, especially for quality retailers, is to include such standards as part of their branding strategy, in order to improve legitimacy and reputation. In effect, these retailers have become heavily involved with the industry assurance schemes, and by doing so are reducing the need for them to run their own assurance scheme through buying product exclusively from these assurance schemes. With the control that British supermarkets have over the supply network, they can ensure that standards can be implemented relatively easily. Whereas the producer-led Label Rouge scheme in France has not developed the same relationship with retailers, they are equally valuable in involvement with initiatives that include animal welfare criteria. The findings from this study also indicate that within the European dairy and livestock market the development of retailer own brands that have started to embrace quality and safety standards have led to the reduction of the explicit marketing of assurance scheme standards.

The relationship that assurance schemes have with consumers is becoming increasingly confused in Europe, as retailers choose not to use logos or, where they are used as part of a marketing strategy, they do not give a clear picture to the consumer about what standards the products meet. The moves particularly by UK retailers to reduce the use of non-mandatory independent labels (exception is the mandatory organic certification body label) about production standards can be linked to two trends: first, the use of their brand as a logo/ symbol for ‘everything being okay’; second, at the same time you see new logos developing related to healthy food in terms of fat, etc. in the Netherlands, but also in the UK. Sometimes the health-related labels are specific for each brand on own-brand products. In any event, the health-related labels are using up space for other labels on the product packaging. Consequently, labels are used as a market segmentation strategy, which pushes regulating compliance to assurance scheme standards back towards a predominantly industry concern as opposed to one that consumers can engage with. This leads to a large amount of meat and dairy products that are produced to higher animal welfare levels than EU minimum standards but that are not labelled as such. Where the retailers are less dominant, however, the place of the label is still thriving on food packaging for products produced by manufacturers or farming cooperatives. This development makes increasing sense as the meat supply network from suppliers to major retailer is increasingly integrated.

15.4 THE ROLE OF FARMER COOPERATIVES

Farmer cooperatives are particularly influential in terms of the retail market for welfare-friendly foodstuffs in many countries, perhaps most so in Norway and Sweden where they support the development for tighter animal welfare legislation. In France, they have taken the initiative in developing quality schemes, such as Label Rouge, and in Italy quality products like Parmaggiano Reggiano cheese and high-quality milk, which both have animal welfare codes of practice beyond legal minimum. The economic mobilization of farmers again does vary between countries, and where there is collective producer engagement, such as in France and Italy, quality is integral to production and is sold on up the network as such. In contrast, British farmers are collectively mobilized through national statutory bodies such as the Meat and Livestock Commission and the British Pig Executive that market 'British meat'. Historically, they have not differentiated their products along regional or quality lines, leaving retailers space to differentiate products on quality.

Farmers' attitudes to animal welfare should be put in the context of many farmers feeling under pressure, economically as well as socially. They are often asked to comply with more stringent regulation, including animal welfare, but the whole supply chain is not sharing the extra costs. Many farmers distrust the processing industry and retailers, and doubt if their engagement in animal welfare is really more than window dressing. British and Swedish farmers are disappointed especially because retailers import cheaper foreign products produced under less animal-friendly circumstances, while at the same time obliging them to comply with very high standards of production. Generally, farmers in basic and top quality schemes, which follow conventional farming logic, have little faith in consumers' willingness to pay and worry about consumers' lack of knowledge for what concerns animal welfare and quality of production.

15.5 DISCUSSION

It is clear that there are a number of approaches to farm animal welfare that springboard off different meanings of farm animal welfare, including different socio-economic sections of consumer society, different national cultures, different farming practices, different retail brand values, different animal products, to name some of the variables we have identified. So with all this complexity, should there be an attempt to create some uniformity about what good animal welfare consists of (as a label or some such), or is the multiplicity of meanings and practices around farm animal welfare useful for improving farm animal welfare? When it comes back down to the animals, the mechanisms for encouraging changes in farming practices need to be carefully examined. A significant number of animals is being produced with frequent industry inspection systems due to quality assurance schemes; but this is by no means all. Should the aim be to increase the quality assurance scheme route to ensure greater compliance with legal standards and above? If this were to be the case, the relationship between farmers and the supply network (retailers, manufacturers, farmer cooperatives) can enforce this. But do all animal-based products (in the widest sense) need quality assurance schemes? Typically, only higher value products sold as quality products. Today, animal welfare should be understood within its context: as one brand/product quality indicator amongst others.

The citizens of Europe have a high concern about farm animal welfare: this implies that state regulatory systems should meet this at some level, but by far the greatest steps to improve farm animal welfare are found in the market, as the consumers of Europe support a quality-driven food market. They are doing this in Sweden when they buy Swedish meats, in Norway when they buy Norwegian, in the UK when they buy retailer brands that include the farm animal welfare concern as a brand value, they are doing this in France and Italy when they buy their high quality products, they are doing this in the Netherlands since the sale of caged eggs ended in the major retail stores. It is animal welfare as a quality that works in exciting, innovative ways in European society today.

Part III

Cattle Farmers and Animal Welfare: A Study of Beliefs, Attitudes and Behaviour of Cattle Producers across Europe

by

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Work Package 1.3

EU Food-CT-2004-506508

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SUMMARY OF PART III

Subproject 1 of the Welfare Quality® programme investigates the attitudes and practices of consumers, retailers and producers concerning animal welfare and assesses to what extent new welfare strategies may be acceptable among them and achievable in practice. The producer study integrates four tasks. The first is a review of socio-political and market development of animal welfare schemes in the six participating countries (France, Italy, the Netherlands, Norway, Sweden, and the United Kingdom). It evaluates the status of national legislation on animal welfare and identifies four types of animal welfare production schemes (Bock and Van Leeuwen, 2005). The remaining three tasks are case studies looking into the situation in pig production, cattle production and poultry production. The studies focus on farmers' attitudes towards animal welfare, on factors affecting the decision to participate in animal welfare schemes, and on their judgement of current animal welfare regulations. Through cross-country comparison, we try to find out if farmers across Europe think differently about animal welfare and have different experiences. Besides, comparison across animal welfare schemes should reveal if and how participation in such schemes affects farmers' attitudes and perspectives. This is the report of the case study among cattle farmers, which focuses on the perspective of farmers engaged in dairy production, beef production or veal production. These subsectors differ from each other in animal welfare legislation and husbandry systems. Comparison between subsectors will show whether the difference in production circumstances influences farmers' attitudes towards animal welfare.

Animal Welfare Schemes and Legislation

There is no specific EU animal welfare legislation for dairy and beef production, apart from a specific EU directive for calves under six months and a general directive for the welfare of farm animals. Norway, Sweden and the United Kingdom have national legislations for the animal welfare of dairy and beef cattle, which is above the level of the general EU directive for farm animals. France, Italy and the Netherlands follow the EU legislation. Regarding the production of veal (calves under six months), the national animal welfare laws of Sweden, Italy, the Netherlands and the United Kingdom are stricter than the EU directive; France follows the EU directive.

In the pig sector, the development of national animal welfare legislation and the development of quality assurance schemes are interrelated. There were, on the one hand, countries (such as France and the Netherlands) with moderate national animal welfare legislation that raises the level of animal welfare by way of the market and through various quality assurance schemes. On the other hand, there are countries (such as Norway and Sweden) with stringent national animal welfare legislation, where animal welfare is perceived as the responsibility of the government and only few animal welfare schemes are developed.

In the cattle sector, this relationship is less clearly visible. Norway, Sweden and the United Kingdom have more stringent animal welfare legislation for cattle than France, Italy and the Netherlands. But there is little difference between the countries in terms of the occurrence of quality assurance schemes for dairy and beef. This can be explained possibly by the lack of public concern about animal welfare in the more extensive production types such as dairy and beef farming. Without public concern, there is neither a political driver for stricter animal welfare legislation, nor a market niche that would stimulate agribusiness to develop quality assurance schemes. The public does, however, worry about the welfare of veal calves. This has led to specific animal welfare legislation for calves in the EU. But only in the Netherlands there is a specific animal welfare scheme for veal.

Farmers' Attitudes towards Farming and Animal Welfare

All cattle farmers considered it an essential aspect of good farming to provide good care for animals. Good care ensured animal welfare and a good performance of the animals, which again resulted in a good income for the farmer. Cattle farmers, who participated in the basic and top quality assurance schemes differed from cattle farmers who participated in specific animal welfare and organic schemes in their definition of 'good animal welfare'. The first group of farmers described animal welfare in terms of animal health, comfortable housing conditions and the absence of stress. Farmers from the second group defined animal welfare as the possibility for the animals to express natural behaviour. Both groups agreed about why animal welfare is important and how it could be assessed.

The cattle farmers who decided to enter specific animal welfare schemes did so because it improved their market position or because they agreed with the animal welfare specifications of the scheme. Cattle farmers who chose organic production referred to ethical concerns but also to the improvement of their market position. The ethical concerns of farmers related mainly to concerns about the environment and food safety and not to worries about animal welfare problems in cattle farming.

Beef and cattle farmers also differed in their definition of animal welfare. Beef farmers, and suckling-cow farmers especially, considered the possibility of expressing natural behaviour to be an important aspect for animal welfare. Veal farmers focused on animal health in the first place when defining animal welfare.

Farmers' Experiences with Animal Welfare Schemes

In most of the participating countries, farmers felt pressured to participate in a quality assurance scheme as their buyers either refused to buy products from farmers who did not participate in a quality assurance scheme or did so only against a reduced price. In Italy, it was less common for farmers to participate in a quality assurance scheme.

The overall experiences of cattle farmers in quality assurance schemes were quite similar across the six countries. As described above, the motivations of farmers to participate in basic or top quality assurance differed from farmers who operate in the specific animal welfare or organic schemes. The first group was mainly driven by market or societal considerations, such as the sector's image. In the second group, farmers referred to ethical concerns in the first place, although market-related motivations played a role as well.

When asked about their hesitance to participate in a scheme with more stringent animal welfare regulations, most farmers expressed their distrust in the economic viability of such schemes or their difficulty or unwillingness to fulfil these extra and more stringent specifications. In the case of organic schemes, however, it was mainly specifications about the use of fertilizer, medicines, eradicants and feed that were referred to as constraining measures and not animal welfare specifications.

In general, cattle farmers thought that quality assurance schemes brought more transparency to agricultural production. This improved the image of the sector but produced also insights and information that was considered useful for farm management. Furthermore, farmers believed that participation in quality assurance schemes was important for market access in modern agriculture. When asked about the disadvantages of quality assurance schemes, most farmers referred to scheme specifications that are time and labour consuming or did not directly serve to benefit the farmer.

Farmers' Opinions about Specific Animal Welfare Measures

In most countries, there is no specific animal welfare legislation for dairy and beef cattle. Sweden has specific regulation about outdoor exercise for cattle, regular hoof trimming, minimal stable size and soft surface requirement. In addition, burn marks, dehorning without anaesthesia and the tethering of animals is prohibited. The latter will be the case in Norway in 2012. Most cattle farmers had no problems with the current animal welfare legislation and thought that most of the proposed animal welfare measures were beneficial for the cows' welfare. In Italy, the Netherlands and the United Kingdom, however, only a minority of the farmers was in favour of a ban on tethering cows. Following Dutch farmers, both tethering systems and loose-housing systems had their own advantages and disadvantages for animal welfare. In the Netherlands, some of the dairy farmers argued in a similar way when asked about mandatory outdoor access. According to them, with proper adjustments of the indoor living conditions, the welfare of cows kept indoors the whole year round could be equal to the welfare of cows with outdoor access. In the Netherlands, many dairy farmers feared that strict environmental regulation would force them to keep their dairy cows indoors in the near future. Thus, the assessment of the future coloured farmers' evaluations of the welfare effect of certain housing systems.

Veal farmers work in a different situation than dairy and beef farmers. There is a specific EU regulation for the animal welfare of calves less than six months of age. This regulation has forced veal farmers to invest in their stables, to switch from individual housing to group housing. Veal farmers felt that they had invested enough to solve animal welfare problems in their production system and were not prepared to accept more and more stringent measures in the near future.

Farmers' Perceptions of Society and Market

Dairy and beef farmers did not feel pressured by animal welfare legislation or by the public perception of animal welfare in their sector. This was experienced differently by veal farmers, who felt being closely watched and mistrusted by the general public and pushed by legislation to make considerable investment in animal welfare.

In general, cattle farmers thought that the average consumer wanted animal-friendly products but was not willing to pay extra money for these products. Besides Italian and Swedish farmers, most farmers thought that retailers could play a major role in the development of animal-friendly production; but farmers were sceptical if retailers really wanted to play this role. In line with this, many cattle farmers in France, the Netherlands, Norway, Sweden and the UK did not believe that animal-friendly products would be successful in the market. In their opinion, there were hardly any problems with animal welfare in their sector. As a result, the difference between regular products and animal-friendly products would be too small to convince the consumer to buy animal-friendly products.

Differences across Countries

There was little difference between countries in terms of farmers' attitudes towards animal welfare, animal welfare legislation, animal welfare during transport and slaughter, or their belief in animal-friendly products. This can in part probably be explained by the fact that the context of cattle farming is quite similar across the six countries, in terms of production circumstances but also with regard to legislation.

Different from the pig study, cattle farmers did not complain about unfair competition due to different national levels of animal welfare legislation; this can of course be explained by the fact that there is no specific animal welfare legislation for dairy and beef cattle and that there is little difference in the regulation of the veal sector. There is also little difference between the six countries in the development of quality assurance schemes. Most countries have basic and top quality assurance schemes and an organic scheme. Only the United Kingdom and the Netherlands have a specific animal welfare scheme. Whereas it was still rare for Italian farmers to participate in a quality assurance scheme, farmers from France, the Netherlands, Norway, Sweden and the UK experienced high market pressure to produce within a quality assurance scheme. Most of their buyers either refused to buy products from farmers who did not participate in a quality assurance scheme or imposed severe price cuts.

There was little difference between countries with regard to farmers' attitudes towards animal welfare, animal welfare legislation, animal welfare during transport and slaughter, or their belief in animal-friendly products. Participation in quality assurance schemes and differences between dairy, beef and veal producers proved to be more important.

Differences across Quality Assurance Schemes

Farmers who participated in basic or top quality assurance schemes differed in their perception of animal welfare from farmers who participated in specific animal welfare or organic schemes. But the differences between cattle farmers were much smaller than between pig farmers. Just like in the pig study, farmers participating in basic and quality assurance schemes described animal welfare primarily in terms of animal health, living conditions for the animals, and absence of stress. Farmers who worked in a specific animal welfare or organic scheme defined animal welfare as the possibility to express natural behaviour. Generally, cattle farmers did not perceive their way of production as problematic for animal welfare. According to the farmers, there was also little difference in the level of animal welfare between conventional practices and organic practices.

There was little difference among the two groups of cattle farmers with regard to their perception of animal welfare legislation or their readiness to accept new animal welfare measures. Generally speaking, all farmers were ready to accept all measures proposed in this research. Scheme participation had also little effect on farmers' opinions about transport, slaughter, market and society. There was hardly any difference on this point between cattle farmers participating in basic and top quality assurance schemes and farmers from specific animal welfare and organic schemes.

All cattle farmers considered good care-taking of animals as an essential part of farming and characteristics of a 'good farmer'. Taking good care of animals ensured animal welfare, good performance of animals and ultimately a good income.

Differences across Subsectors

In order to understand the difference in farmers' attitudes, beliefs and behaviour towards animal welfare, differences between cattle subsectors are more important than differences between countries or production schemes. It clearly mattered whether farmers were engaged in dairy, beef or veal farming, in how they thought about animal welfare. This can be explained by differences in farming practices, in farmers' contacts and relations with animals but also by their different experiences with public concern about animal welfare.

Veal farmers have been confronted with public concerns about animal welfare for many years, and the sector has been subject to numerous animal welfare campaigns and numerous alterations in legislation. Veal farmers thought that they had invested enough for the time being and were not ready to accept more stringent legislation. Beef and dairy farmers felt that there were no serious animal welfare problems in their subsector. Also, they felt little pressure from public concern, government and animal welfare campaigners to change their ways of production.

The most importance difference between veal, beef and dairy farmers regarded their perception of animals and their relations with them. Generally, suckling-cow farmers kept their animals outdoors, on pastures or on nature conservation grounds; in their view, the possibility to express natural behaviour was an important precondition for the welfare of animals. The same applied for dairy farmers generally. Veal farmers with very intensive and indoor systems did not refer to behavioural aspects at all, but focused on animal health.

Differences in farm practices and experiences mattered also for farmers' opinions about animal welfare during transport and at slaughtering Dairy farmers had little experience with animal transport and slaughter as they generally sold their calves and their cows to a trader who looked after the transport of the animals. Veal farmers, on the other hand, were accustomed to receive young calves through transport, sometimes from long distances, and beef farmers sometimes transported their own animals to be sure that the endeavour is as stress free as possible and to avoid losing meat quality due to careless transport. Meat-producing farmers were also more aware of the conditions at slaughterhouses, although not many farmers had actually visited a slaughterhouse.

17

INTRODUCTION TO PART III

Subproject 1 of the Welfare Quality® programme studies the attitudes and practices of consumers, retailers and producers concerning animal welfare and assesses to what extent new welfare strategies may be acceptable among them and achievable in practice. The producer study reports on the perspective of farmers engaged in livestock production. It aims at understanding farmers' motivations to engage in animal-friendly production, as well as identifying incentives and barriers to the development of animal-friendly products and the adoption of more rigorous animal welfare standards. It integrates four tasks. The first task is a review of socio-political and market developments of animal welfare schemes in the six participating countries (France, Italy, the Netherlands, Norway, Sweden, the United Kingdom). It evaluates the status of national legislation on animal welfare and identifies four types of animal welfare production schemes (Bock and Van Leeuwen, 2005).

- Basic (farm) quality assurance schemes: most of these focus on food safety, product quality and traceability. They may or may not contain an animal welfare module regulating animal welfare at the level of European or national legislation.
- Top (farm) quality assurance schemes contain an animal welfare module, but generally focus on food safety, product quality and traceability. The animal welfare standards defined go beyond European or national legislation.
- Specific animal welfare schemes deal specifically with animal welfare and claim to guarantee significant improvements in animal welfare. Generally, the animal welfare standards defined go well beyond European or national legislation.
- Organic schemes follow the basic organic philosophy for farming. Animal welfare is included in this philosophy, but the focus of organic farming is broader, including concerns about environmental protection, health, food safety and quality and animal welfare. Their animal welfare standards go well beyond European or national legislation.

The remaining tasks of the producer study consist of three case studies looking into the situation in pig production, cattle production and poultry production. This report describes the second of these case studies and focuses on the perspectives of farmers in the cattle sector, engaged in dairy farming, beef or veal production. This case study started in November 2005.

17.1 RESEARCH OBJECTIVES

The case studies focus on farmers' attitudes to animal welfare, on factors affecting the decision to participate in animal welfare schemes and on their judgement of current animal welfare regulations. By way of cross-country comparison, we try to find out if farmers across Europe think differently about and have different experiences with animal welfare. Furthermore, comparison across animal welfare schemes should reveal whether and how participation in schemes affects farmers' attitudes and perspectives. The study looks also into relevant differences between subsectors, such as in this case dairy, beef and veal farmers.

Summarizing the objectives listed in detail in the technical annex of Welfare Quality®, this case study should achieve the following:

- an understanding of beliefs, views, conceptions and attitudes of producers with regard to farm animal welfare and current animal welfare regulations;
- an assessment of motives, considerations and incentives that weigh upon the decision to participate or not in the animal welfare scheme, now or in the years to come;
- an analysis of barriers encountered by non-participating producers to entering (or withdrawing from) animal welfare schemes related to their appreciation of the animal welfare issue, view on legal regulations, required farm adjustments, finances, social environment and information obtained;
- an analysis of farmers' experiences with participation in animal welfare schemes;
- an assessment of farmers' communication strategies on animal welfare activities;
- an identification of information strategies of interested producers with respect to details on existing welfare schemes.

17.2 RESEARCH METHODOLOGY

Research Sample

In accordance with the terms of reference of the project, each national team selected 60 cattle farmers. In France, Italy and the Netherlands, a sample was selected in collaboration with representatives of the dairy sector, beef sector and veal sector. In Norway, Sweden and the United Kingdom, there is no veal production present; these countries selected a sample with representatives from the dairy and beef sector. The sample was stratified according to the participation or non-participation of farmers in quality assurance schemes. Per country it was tried to stratify the sample in five categories:

1. farmers participating in a basic quality assurance scheme;
2. farmers participating in a top quality assurance scheme;
3. farmers participating in a specific animal welfare scheme;
4. farmers participating in an organic scheme;
5. farmers who do not participate in quality assurance schemes.

Comparison of these groups of farmers enables us to identify incentives and barriers in the conversion to animal welfare schemes and to understand how conversion to more animal welfare production methods could be encouraged and supported by policy interventions.

The study is based on a purposive sample of farmers in order to understand if participation in animal welfare schemes matters for farmers' readiness to improve animal welfare. Therefore, we needed to choose farmers from different schemes. This resulted in an over-representation of farmers participating in relatively stringent animal welfare schemes. The six counties do not all have an equal amount of animal welfare schemes or host every defined level of animal welfare schemes. In some countries, it was not possible to find non-participating farmers since nearly 100% of the farmers were participating in the lowest level of animal welfare schemes. In addition, we tried to maximize variation with regard to other characteristics such as age, gender, geographical situation, farm type and farm size. The precise composition of the national samples is summarized in Tables 17.1 and 17.2.

The study explores the diversity in beliefs, attitudes and behaviour concerning animal welfare among cattle farmers and tries to understand the significance of scheme participation, differences between subsectors and between countries. The sample is too small to be regarded as representative, but does reflect the differences that are expected to matter. As a result, the case study can demonstrate the range of beliefs, attitudes and behaviour, but not the frequency with which these beliefs, attitudes and behaviour occur in the group of cattle farmers in the six countries.

In the Italian sample, the thirty farmers who did not participate in any scheme consisted of 10 dairy farmers, 10 beef farmers and 10 veal farmers. There are no quality assurance schemes present for veal production in Italy. The farmers who participated in a basic quality assurance schemes were five dairy farmers and five beef farmers. The farmers in a top quality assurance scheme were five dairy farmers and five beef farmers. In Italy there are no specific animal welfare schemes for cattle at present. In the organic scheme there were again five dairy and five beef farmers.

Table 17.1 Research samples per country by production type.

Country	Dairy farmers	Beef farmers	Combined dairy and beef farmers	Veal farmers	Total
Italy	25	25	-	10	60
France	20	27	-	13	60
Netherlands	20	19	-	22	61
Norway	37	23	-	-	60
United Kingdom	11	43	8	-	62
Sweden	14	33	13	-	60

TABLE 17.2 Research sample per country by scheme participation.

Country	Non-participant	Basic quality assurance scheme	Top quality assurance scheme	Specific animal welfare scheme	Organic scheme	Total
Italy	30	10	10	-	10	60
France	-	27	21	-	12	60
Netherlands	2	39	-	10	10	61
Norway	2	48	-	-	10	60
United Kingdom	4	-	39	14	5	62
Sweden	-	5	35	-	20	60

In the French sample there were no farmers who did not participate in any scheme. A total of 27 farmers participated in a basic quality assurance scheme; of these, 13 were dairy farmers, 1 beef farmer and 13 veal farmers. Twenty-one beef farmers worked in a top quality assurance scheme. Also in France, there is no specific animal welfare scheme for cattle operational. Of the organic farmers there were seven dairy farmers and five beef farmers.

Two Dutch farmers did not participate in any scheme, one dairy farmer and one veal farmer. A total of 39 farmers worked in a basic quality assurance scheme, nine dairy farmers, nine beef farmers and 21 veal farmers. Ten farmers from the Dutch sample participated in a specific animal welfare scheme, five dairy farmers and five beef farmers. Finally, 10 farmers from the sample were organic farmers, again five dairy and five beef farmers.

In Norway there are two quality assurance schemes operational, the basic quality assurance scheme KSL and the organic scheme Debio. Both schemes cover all types of animal production.

In the Swedish sample, besides specialized dairy and beef farmers, there was also a group of farmers who combined dairy and beef farming. All farmers from the Swedish sample, who only participated in a basic quality assurance scheme, were specialized beef farmers. Of the farmers who participated in one or more top quality assurance schemes, 13 were dairy farmers, nine farmers who combined dairy and beef farmers, and 13 beef farmers. There is no specific animal welfare scheme for cattle present in Sweden, and in the organic scheme there was one dairy farmer, four farmers who combined dairy and beef farming, and 15 beef farmers.

In the United Kingdom, there are no basic quality assurance schemes present, but there are quite a few top quality assurance schemes present. A total of 39 farmers from the British sample participated in a top quality assurance scheme, three dairy farmers, four farmers who combined dairy and beef farming, and 32 beef farmers. Like the Netherlands, the United Kingdom also has schemes that qualify as a specific animal welfare scheme. Fourteen farmers from the British sample participated in such a scheme, six dairy farmers, three farmers who combine dairy and beef farming, and five beef farmers. The five organic farmers from the British sample were two dairy farmers, one farmer who combined dairy and beef farming, and two beef farmers.

Data Collection and Analysis

In order to gather comparable information the teams agreed upon using a common basic questionnaire (see Appendix 3.7). This questionnaire serves as the basis for all case studies (pig, cattle and poultry). The questionnaire includes questions about the following issues:

- farmers' participation in animal welfare schemes;
- farmers' attitudes towards animal welfare;
- farmers' perceptions of animal welfare legislation;
- farmers' assessments of animal welfare off the farm;
- farmers' perceptions of market and society and belief in animal-friendly products;

Each team was free to adopt the formulation of questions as long as the same issues would be covered. They could also include additional questions. Since the advancement of animal welfare legislation differs across the six countries, some questions needed to be tailor-made; for instance, questions about the adoption of additional animal welfare measures in the future. Each team pre-tested the questionnaire and adapted its formulation when necessary. The questionnaires are semi-structured and include open as well as closed questions. The level of structuring varies per country.

The farmers were interviewed face-to-face and on the farm. Because of the distances and low density of farms, the Swedish and Norwegian team did approximately half of the interviews face-to-face and half by telephone. The interviews lasted on average two hours.

For a qualitative analysis, conformity of questions and response categories is not important. The purpose of the analysis is to detect the variance in beliefs, attitudes and behaviour and not to measure the frequency of a given category. The analysis is focused on uncovering issues and concerns and on understanding motivations and reasoned behaviour. For the latter, flexibility and room account of contextual characteristics is of great importance. Every research team analysed the collected material in this manner, trying to find out if participation in production schemes, national differences or other factors matter for farmers' attitude, beliefs and behaviour.

Each national team reported on its findings in a national report (see references). The synthesis report is based on these reports, summarizing but also comparing national findings. In order to find out if participation in animal welfare schemes makes a difference, we compare farmers across quality assurance schemes both nationally as internationally. To detect whether differences in the national context of the cattle sector influence the responses of the farmers we compare between countries. In the cattle case study, three sub-sectors are studied: dairy, beef and veal production. These sub-sectors differ from each other in legislation and husbandry system; to ascertain if these differences influence farmer's answers we also compare between the different sub-sectors when relevant.

17.3 OUTLINE OF PART III

In Chapter 18, we will describe and compare the national context of cattle farming in the six countries, looking into the size of the cattle sectors, current animal welfare legislation and the presence of quality assurance schemes. Chapter 19 deals with animal welfare schemes, farmers' motivations for participation and their experiences. In Chapter 20, we will analyse farmer's attitudes towards animal welfare – their opinions about good farming, relations with animals, definitions of animal welfare, the importance they attach to animal welfare and how they assess the welfare of animals on their farm. Chapter 21 describes how farmers think about animal welfare regulation and some specific animal welfare measures. Chapter 22 looks into animal welfare beyond the farm – during transport and at the slaughterhouse. In Chapter 23, we will analyse how farmers think about the role of market and society in improving animal welfare. We will look into farmers' ideas about the role of consumers, retailers and the government in improving animal welfare and the possibilities for animal-friendly products on the market. In Chapter 24, we draw conclusions regarding farmers' participation in animal welfare schemes and their readiness to engage in more animal-friendly production methods, both across schemes, across production types and across the six countries.

18

CONTEXTS OF THE CATTLE SECTORS ACROSS EUROPE

In order to compare the six countries studied, it is important to take the context of cattle farming into account. Therefore, we will start with a brief overview of the size and organization of the sector as well as its relevant legislation per country.

18.1 THE SIZE AND ORGANIZATION OF THE CATTLE SECTORS

In most countries, the number of cattle farms and the number of cattle is in continuous decline. At the same time, the number of animals per farm increases, resulting in concentration and scale enlargement. Over the last four to five years, the increase in animals per farm was highest in Norway and the United Kingdom, by 29 per cent (from 1999 until 2004) and 28 per cent (from 1998 until 2003), respectively. In the other countries, the increase in average number of animals per farm was 17.5 per cent in Italy (from 2000 until 2003), 17 per cent in the Netherlands (from 2000 until 2005) and 11 per cent in Sweden (from 2000 until 2004). The cattle sector consists of three subsectors: dairy production, beef production and veal production. Table 18.1 shows the characteristics of the dairy sector in the six countries. The characteristics of the suckling cow and fattening cattle sector are presented in Table 18.2, the veal sector in Table 18.3.

The United Kingdom has the highest number of animals per farm, while Sweden and the Netherlands have the highest average milk yield per dairy cow. Generally, dairy cows are

TABLE 18.1 Statistics of number of dairy farms, dairy cows, average number of animals per farm and average milk yield.

	France	Italy	Netherlands	Norway	Sweden	UK
Number of farms with dairy cows	112,000	52,674	24,332	17,184	9,147	25,924
Number of dairy cows	4,019,000	1,838,000	1,470,589	271,736	403,702	2,128,049
Average number of dairy cows/farm	36	35	60	16	44	82
Average milk yield per cow per year (kg)	6,000	5,944	7,415	6,150	7,955 (2004)	6,770 (2005)

TABLE 18.2 Statistics of number of cattle farms, number of cattle and average number of animals per farm in 2000 and 2004.

	France (2004)	Italy (2000)	Netherlands (2004)	Norway (2004)	Sweden (2004)	UK (2004)
Suckling cow farms						
Number of farms with suckling cows	146,000	35,305	10,565	5,881	13,013	61,591*
Number of suckling cows	4,071,000	445,750	211,236	52,980	171,300	1,735,257*
Average number of suckling cows/farm	28	13	20	9	13	28*
Fattening cattle farms						
Number of farms with fattening cattle	28,000	43,348	2,427	1,945	n/a	n/a
Number of fattening cattle	900,000	651,369	9,242	30,200	n/a	n/a
Average number of fattening cattle/farm	32	15	4	16	n/a	n/a

Note: * no separate data available for suckling cows and fattening cattle.

TABLE 18.3 Statistics for France, Italy and the Netherlands on number of veal farms, number of veal calves and number of animal per farm.

	France (2004)	Italy (2000)	Netherlands (total) (2004)	Netherlands (white veal production)	Netherlands (rosé veal production)
Number of farms veal calves	4,300	21,031	3,006	1,898	1,255
Number of veal calves	1,340,000	360,660	828,740	624,513	204,227
Average number of veal calves/farm	312	17	276	329	162

kept outside during summer and fed on grass silage, maize or hay during winter. In the Netherlands, indoor production increases due to pressure from national environmental legislation; in 2004, 15 per cent of Dutch dairy cows were kept indoors whole year round.

Generally, dairy farmers deliver their milk to local processing companies, which process the milk into liquid milk for consumption and numerous other products, from cheese and butter to milk powder. This makes it difficult to assess the relative competitive position of each of the six countries.

Beef production can be divided in a breeding branch (suckling cows) and a fattening branch (fattening cattle). Generally, suckling cow production is an extensive way of producing. Herds of suckling cows, heifers and calves are kept outdoors on pasture during summer and are kept indoors during winter. Apart from in Sweden, fattening cattle is raised generally in a more intensive manner, usually indoors and fed on a maize/cereal diet. In France, there is a separate type of beef production: maternally nursed calves. These calves are nursed by their mother until they are slaughtered at an age of 7–12 months. Table 18.2 gives an overview of the beef production sectors in the six countries. France has the largest number of suckling cows and fattening cattle, followed by Italy and the United Kingdom. Because UK's and Swedish statistics do not distinguish between suckling cows and fattening cattle, it is not possible to compare production size of the UK, Sweden, France and Italy. Important is also to take into account that the trade position of the UK has been severely damaged by an export ban for life cattle, beef and beef products, imposed by the EU after the BSE crisis but recently lifted. Still, the UK is a large beef producer.

In the Netherlands, Norway and Sweden beef production is small compared to the other three countries.

Comparing the production and import/export figures of the six countries, as shown in Table 18.4, France and Italy turn out to be the largest producers of meat. France is the only country that is a beef exporter, the other countries all need to import beef to fulfill consumer demand.

Veal production does not exist in Norway, Sweden and the UK. In Italy, only white veal is produced whereas France and the Netherlands produce white veal as well as rosé veal. Veal production is an intensive system with calves raised indoors. In white veal production, calves are fed on a milk-based diet and are slaughtered generally at the age of 6–8 months. In rosé veal production, calves are raised on a roughage-based diet and slaughtered at 7–12months. In the Netherlands, rosé veal production is developed in response to public concerns about the low haemoglobin level and risk of anaemia in calves in white veal production. In France, the rosé veal production (as IGP Veau d'Aveyron) represents a very small niche. Table 18.4. gives statistics for the number of veal farms, number of veal calves and the average number of animals per veal farm in France, Italy and the Netherlands.

Comparing production and import/export figures of the veal producing countries, France turns out to be the largest veal producer although it still needs to import veal to fulfill domestic demand. The Netherlands produces veal mainly for export; about 90 per cent of Dutch veal production is exported (Table 18.5).

TABLE 18.4 Comparison of domestic production, import and export of beef meat (x1000 tonnes).

(year)	France (2004)	Italy (2000)	Netherlands (2004)	Norway (2004)	Sweden (2004)	UK (2004)
Production from slaughtering	1450	1145	184	86.5	458	710
Imports meat and meat products	230	392	308	5.3	56.5	619
Exports meat and meat products	340	128	200	0.4	4.4	13

TABLE 18.5 Comparison of domestic production, import and export of veal (x1000 tonnes).

	France (2004)	Italy (2000)	Netherlands (total) (2004)
Production from slaughtering	230	142	202
Imports meat and meat products	39	n/a*	7
Exports meat and meat products	-	n/a*	185

Note: * In Italy there are only combined statistics on the import and export of veal and beef meat. It was not possible to find statistics specifically for the import and export of veal.

18.2 NATIONAL LEGISLATION FOR ANIMAL WELFARE

The EU has two directives that deal with the welfare of cattle: the general Directive Concerning the Protection of Animals Kept for Farming Purposes (Council Directive 98/58/EC, OJ L221, 8 August 1998, pp. 23–27), and a specific Directive Laying Down Minimum Standards for the Protection of Calves (Council Directive 91/629/EC, OJ L340, 11 December 1991, pp. 28–32). The latter directive only applies to calves up to six months old. There is no specific animal welfare legislation in the EU for dairy and beef cattle.

The EU Directive 98/58/EC reflects the 'five freedoms'.

- Freedom from hunger and thirst – access to fresh water and a diet for full health and vigour.
- Freedom from discomfort – an appropriate environment with shelter and comfortable rest area.
- Freedom from pain, injury and disease – prevention or rapid treatment.
- Freedom to express normal behaviour – adequate space and facilities, company of the animal's own kind.
- Freedom from fear and distress – conditions and treatment which avoid mental sufferings.

This EU Directive is implemented in all six countries; Norway, Sweden and the United Kingdom have some additional provisions in their national legislation. In Norway, it is already mandatory to provide cows and heifers with outdoor access and grazing for eight weeks during summer. Norwegian legislation tells that cows and heifers need to have access to a lying area with solid floor and soft surface two months before calving. In addition, dehorning and castration may only be done by a veterinarian with the use of sedation; it is not allowed to disbud cattle older than six weeks. There are also further and future requirements in the Norwegian legislation that surpass the EU Directive 58/98/EC. In 2006, the use of soft mats for cows became mandatory. From 2009 onwards, cattle producers must have a documented competency in handling cattle. From 2013 onwards, all cattle (except non-castrated bulls) must have the possibility to go outside for an minimum of eight weeks during summer. From 2024 onwards, the use of tie-up sheds will be prohibited and from 2004 onwards it is not allowed to built or rebuilt such stables.

Following Swedish laws, cattle must have the possibility for outdoor exercise and stables and boxes for cattle (also in free-range systems) have to follow requirements concerning floor type and bedding material, with additional requirements regarding the equipment around and during delivery. There are extra provisions for tethered cows, and dehorning without anaesthesia is forbidden. Important is also that cows and newborn calves are not to be separated during the first month. The raising of veal and rosé calves is constrained (although not explicitly forbidden by law) through the prescription of balanced feed for all cattle. In practice, veal is not produced in Sweden and is considered as an animal-unfriendly production type (for more detailed information on Swedish legislation, see Bruckmeier and Prutzer, 2006).

United Kingdom legislation has specifications about the use of bedding materials and floor type, stocking density, extra provisions in case of tethered cows, and extra restrictions for dehorning. France, Italy and the Netherlands have no extra provisions for the animal welfare of cattle.

The most important standards of EU Directive 91/629/EC, for calves under six months of age, are:

- All calves older than eight weeks must be housed in groups for stables built or rebuilt after 1 January 1998 and for all stables from 31 December 2006.
- A minimum area of 1.5 m^2 per calf up to 150 kg is required for stables built or rebuilt after 1 January 1998 and for all stables from 31 December 2006.
- A minimum area of 1.7 m^2 per calf of 150–220 kg is required for stables built or rebuilt after 1 January 1998 and for all stables from 31 December 2006.
- A minimum area of 1,8 m^2 per calf over 220 kg is required for stables built or rebuilt after 1 January 1998 and for all stables from 31 December 2006.
- The boxes of calves younger than eight weeks must be at least as wide as the height of the calf. The length of the boxes must be equal to the body length of the calf, multiplied by 1.1.
- Individual pens must have perforated walls to allow the calves to have direct visual and tactile contact.
- From the second week of age, calves will be fed a minimum amount of 250 grams of fibrous fodder per animal per day, the quantity being raised from 50 g to 250 g per day for calves from 8 to 20 weeks old.
- The minimum average blood content of haemoglobin is at least 4.5 mmol/litre.
- All calves must be fed at least twice a day.
- Each calf shall receive bovine colostrums as soon as possible after it is born and in any case within the first six hours of life.

This EU Directive is implemented in the national legislation of all six countries. Some countries have stricter provisions in their national legislation. Minimum space requirements are not applicable for calves that are housed with their mothers for suckling, or for holdings with fewer than six calves. In its national legislation, Italy does not make this exception for these two groups. In the Netherlands, the individual housing for veal calves older then eight weeks was banned from 31 December 2003 instead of 31 January 2006. In the United Kingdom, space provisions for calves are stricter than in the EU Directive 91/629/EC; they prescribe:

- A minimum area of 2 m^2 per calf of 150–200 kg.
- A minimum area of 3 m^2 per calf over 200 kg.

In Sweden and Norway legislation prescribes the provision of balanced feed and a prolonged stay of the calf with the cow, which constraints the production of white and rosé production. In both countries there is hardly any veal production.

18.3 QUALITY ASSURANCE SCHEMES IN EUROPE

To ensure higher levels of quality, there are quality assurance schemes operational in several countries in Europe. Some quality assurance schemes include specific measurements for animal welfare. As described in the Chapter 17, four categories of so-called ‘animal welfare schemes were defined (Bock and Van Leeuwen, 2005). These identified categories of animal welfare schemes were used in all case studies, although some of the schemes are more prominent and relevant in some sectors and countries compared to others, and not all scheme-categories are present in all countries.

France

In France, there are several quality assurance schemes for dairy, beef and veal production.

- The Protected Designation of Origin schemes (PDO). In France there are mainly PDO schemes for the production of cheese, created in 1955 and managed by producers and dairies, grouped in a ‘defence union’ of a specific AOC. These schemes do not include animal welfare and qualify as basic quality assurance schemes. For the French sample, the PDO schemes from Epoisse was used.
- The Conformity Certification schemes (CCP). These schemes concern the beef and veal meat sectors. Generally, they do not include animal welfare specifications above the level of French legislation and thus qualify as a basic quality assurance scheme. They were established by producer associations (cooperatives or groups of economic interest), some in 1990–1991, and others later, in 1998. For the French sample, the scheme ‘Veau de Boucherie’ was used.
- Charte des Bonnes Pratiques d’Elevage (CBPE, Charter for Good Farming Practice). This is a collective and voluntary scheme for both beef and dairy farmers, which currently has 125,000 participating cattle farmers. It qualifies as a basic quality assurance scheme. It was founded in 2000 by the national producers’ union (FNB, National Bovine Federation, and FNPL, National Milk Producers Federation).
- Label Rouge schemes (Red Label schemes). These schemes are based on the requirements of the CBPE schemes and some include extra animal welfare specifications, which qualifies some of these schemes as top quality assurance schemes. For the French sample the Label Rouge Limousin Blason Prestige (created

in 1988) and the IGP Veau d'Aveyron et du Ségala (created in 1994) schemes were used. They were established by producers and retailers.
- L'Agriculture Organique. This scheme is for organic dairy and beef farmers.

Italy

In the Italian dairy sector, there are several schemes present:

- PDO schemes. These schemes generally do not pay specific attention to animal welfare and can be qualified as basic quality assurance schemes. In the Italian sample, the farmers from the basic quality assurance scheme worked in the PDO scheme for Parmigiano-Reggiano cheese, which was founded in 1937.
- The Italian environmental movement Legambiente did initiate the top quality assurance scheme LAIQ in 2001.
- Organic milk production.

For the Italian beef sector, the following quality assurance schemes exist:

- IGP Vitellone Bianco dell'Appennino (founded in 1998 by the Consorzio Produttori Carne Bovina Pregiata delle Razze Italiane) and CONAZO (Consorzio Nazionale Zootechnico, founded in 1978 by a cooperative of butchers and manufacturers). These are basic quality assurance schemes.
- QC (Quality Controlled). This is a scheme for beef meat (from the Limousin and Romagnola breeds), produced in the Emilia-Romagna region. This scheme was issued by the regional government of Emilia-Romagna on 28 October 1999 by Regional law number 28 ruling the QC label.
- Organic beef production.

There are no quality assurance schemes for veal production in Italy. All veal farmers in our sample produce outside a quality assurance scheme.

The Netherlands

There are several quality assurance schemes in the Netherlands for both the dairy, beef and veal sectors. The following are the quality assurance schemes in the dairy sector.

- KKM. KKM was initiated in 1998 by the Dutch dairy industry and dairy farmers. Over 90 per cent of the dairy farmers in the Netherlands participate in this scheme. Farmers who do not participate receive a price cut or € 0.5 ct/kg milk. In 2006, the KKM scheme was transformed to private quality assurance schemes of dairy and cheese factories.

- CONO. In 2002, the Dutch cheese factory CONO Kaasmakers started a scheme to encourage the practice of grazing. Dairy farmers who apply grazing for five hours a day, 100 days per year, receive a premium price of € 0.5 ct per kg milk. CONO Kaasmakers has approximately 650 supplying dairy farmers, of which a large part has entered this scheme. The scheme has no other requirements than the obligatory grazing of the dairy cows. This makes this scheme a specific animal welfare scheme.
- Organic dairy production. In 2004, there were 305 organic dairy farms operating in the Netherlands, producing 99 million kg of milk.

There are three quality assurance schemes in the beef sector.

- IKB Beef. This scheme assures both beef produced from slaughtered dairy cows and beef produced from fattening bulls. Nearly all the beef that was produced was covered by this scheme. Animal welfare is not included in the scheme specifications, which makes this scheme a basic quality assurance scheme. Due to a change in policy from the Ministry of Agriculture, it is not possible to keep this scheme operational as a public scheme. In April 2006, it was decided to terminate the IKB Beef scheme.
- Scharrel (Free range). This scheme was originally started in 1994, but was revived by beef producers and butchers in 1999. Beef producers have to participate in the IKB-Beef scheme before they can enter the Scharrelrundvlees scheme. At the moment there are eight participating beef producers.
- Organic. The organic beef sector in the Netherlands is steadily increasing; in 2005 there were 186 suckling cow farmers and 122 fattening bull farmers who raised 3,762 suckling cows and 2,087 fattening bulls. The market share for organic beef was 3.8 per cent in 2005.

The following are quality assurance schemes for veal production.

- IKB Veal. This scheme is combined with self-control of the use of growth stimulants. All the Dutch veal integrators demand of veal farmers to participate in this scheme, as do most slaughterhouses for rosé veal. This means that nearly all veal farmers operate in this scheme.
- Peter's Farm. This is a quality assurance scheme initiated by the Dutch slaughterhouse Alpuro Group in 1996. The Peter's Farm scheme prescribes the housing of calves in large groups of around 60 calves, much larger than what is usual among veal farmers; the schemes allows for more freedom of movement than average and the possibility to live in a herd. In addition, distractive 'toys' are offered to the calves to prevent urine sucking. This qualifies the scheme as a specific animal welfare scheme. There are roughly 40 veal producers that participate in the Peter's Farm scheme. Since the Alpuro Group was not willing to participate in this research, no farmers participating in the Peter's Farm scheme could be interviewed.

There is no organic scheme for veal production.

Norway

In Norway, there are two quality assurance schemes for the cattle sector, both dairy and beef production, the basic quality assurance scheme KSL and the organic scheme Debio.

- The KSL Quality System for Agriculture (KSL) was launched in 1993. Initially, the programme was set up as a joint effort between the Norwegian agricultural authorities, the producer organizations and other stakeholders of the Norwegian agri-food sector (retail chains, etc.). KSL is one of the competitive strategies devised to promote food produced in Norway. KSL enjoys the support of the entire Norwegian agricultural community, especially the farmer's unions and the wholesalers. The overall purpose is to ensure that Norwegian food remains safe, maintains high quality and is produced according to certain standards. KSL shall help farmers to document their production processes for consumers, wholesalers and the authorities. Since its setup in 1993, the KSL programme has gradually evolved into a broad quality programme. Requirements regarding animal production constitute a substantial component. An important feature is that all requirements in the KSL programme are on level with the rules and regulations that are specified in relevant laws such as the Animal Welfare Act, the Veterinary Act (including their underlying regulations) and several other laws. Thereby, KSL serves to a large extent as an instrument for implementing national rules of law and regulations. In addition, the KSL programme intends to be a tailor-made and practical support structure for farmers in their efforts to comply with the rules and regulations that address animal welfare issues. Eighty-seven per cent of the dairy farmers participate in KSL. The farmers who do not participate in KSL are generally small producers.
- Debio is a private-owned agency that controls and certificates organic production in Norway. Debio was established in 1992. Debio's rules are coherent with the international norms for organic production, as formulated by IFOAM (the International Federation of Organic Agricultural Movements). IFOAM serves as a framework for the more detailed specification of the Debio rules. Debio works by authority of the Ministry of Agriculture and the related governmental control body Matilsynet (Norwegian Food Safety Authority). Debio is also integrated with KSL when it comes to practical inspections of farms.

Since there is no veal production in Norway, there is also no quality assurance scheme for veal production present.

Sweden

Sweden has quite a few basic and top quality assurance schemes and one certified organic scheme.[46] This can be explained by the fact that many schemes operate regionally and are bound to specific slaughterhouses or dairy corporations.

[46] But Swedish farmers can also farm organically under the EU ecological requirements, without being certified by KRAV.

- The Swedish dairy sector has the basic quality assurance schemes MHS and one scheme hosted by a cooperative dairy factory.
- The top quality assurance schemes for the dairy sector are Swedish Milk, Healthy Cow, SvDhv Nöthälsan, and several schemes from cooperative dairies.
- The basic quality assurance schemes in the Swedish beef sector are MHS, Naturbeteskött, Swedish Meats, KLS, and several schemes hosted by cooperative slaughterhouses.
- The top quality assurance schemes for the Swedish beef sector are SvDhv Nöthälsan and two schemes hosted by private slaughterhouses.
- There is no specific animal welfare scheme operational in Sweden.
- The certified organic scheme in Sweden is KRAV, for both dairy and beef producers. The scheme was started in 1985 but has been revised since.

Since there is no veal production in Sweden, there is also no quality assurance scheme for veal production.

The United Kingdom

In the United Kingdom, agricultural quality assurance schemes were introduced at the beginning of the 1990s. They have developed rapidly since then, and at the end of the 1990s there were a large number of schemes operational, creating confusion among producers and consumers. In 2000 the British Food Standard was initiated. Its main objective was to unite existing schemes under one (the Little Red Tractor) label. The majority of these schemes are industry/producer led. The following are the quality assurance schemes for dairy production.

- The National Dairy Farm Assured Scheme (NDFAS), re-branded recently as Assured Dairy Farms, covers about 85 per cent of the milk production in the United Kingdom, representing more than 80 per cent of dairy farmers. It was launched in 1999 by representatives of the milk industry – that is, the National Farmers Union, Dairy Industry Federation of Milk groups and British Cattle Veterinary Association. The scheme is approved to use the Red Tractor logo (for liquid milk). The scheme provides a national benchmark for standards for the dairy sector and focuses mainly on food safety, animal health and welfare. One of its purposes is to reassure consumers of milk and dairy products that standards of production are achieved to a high level and that the milk that leaves farm premises is safe and of a high quality.
- Freedom Food (FF). The only specific animal welfare scheme in the United Kingdom. It was set up in 1994 by the Royal Society for the Prevention of Cruelty to Animals (RSPCA), which also set up the standards for this scheme. Currently, 157 milk producers (covering about 28,000 cows) participate in the Freedom Food scheme. In 2001, there about 250 participating dairy producers. This number has declined due the outbreak of Foot and Mouth Disease.
- Soil Association Farm Assurance Cattle and Sheep (SAFA). The Soil Association is the oldest and largest body for organic production. It was founded in 1946 by a group

of farmers, scientists and nutritionists who were concerned about the way food was produced. In January 2005, 83,000 dairy cows were assured by this scheme.

There are seven main quality assurance schemes for beef production.

- European Food Safety Inspection Service-Farm Assured British Beef and Lamb (EFSIS-FABBL). FABBL was initiated in 1992 by the agrifood industry,[47] having as its main purpose to increase retailers and consumers confidence in British livestock production standards. In order to deliver improved benefits to FABBL's existing members by offering them the opportunity to combine multi-enterprise inspections, FABBL merged in November 2003 with EFSIS, a leading inspection and certification body (http://www.fabbl.co.uk). It is the primary scheme for beef and lamb that operates in England, covering about 15,200 participating farms (in 2003), producing about 1.4 million cattle and 6 million sheep (or 75 per cent and 60 per cent of the slaughtered stock, respectively).
- Assured British Meat (ABM). Established in 1998 by an industry organization, the Meat and Livestock Commission (MLC), it aims to maintain and develop credible standards within the red meat industry (that is, beef and lamb) in terms of food safety, animal welfare and environmental protection (htt://www.abm.org.uk). The scheme is owned by an independent company (ABM Ltd), which represents producers, abattoirs, auctioneers, processors, and the MLC. It does not carry out any certification or inspection activities of its own, but offers licensing standards to various certification bodies, such as CMi (Checkmate International) and EFSIS-FABBL. ABM sets up assurance standards for the beef and lamb sector, and covers the entire chain from farms and livestock transport through auction markets, abattoirs to cutting and packing plants.
- Genesis Quality Assurance (GQ). Created in 1998 as a new type of scheme, it aims to make assurance an essential tool in the management of farm business by helping producers to overcome a number of concerns (for example, volume of paperwork and assurance costs) (http://www.genesisqa.com). This is an integrated modular farm assurance business, where farmers can assure all their farm enterprises (for example, arable, beef and lamb, dairy and pig) in a single inspection. The scheme has been approved to carry the Little Red Tractor (LRT) logo, and it comprises, like all the other schemes under LRT, a range of standards that cover best farming practice, animal welfare, traceability, food safety and environmental issues. In 2001, it had 6,500 members for beef, lamb and crop production.
- Assured Combinable Crops Beef and Lamb Scheme (ACCS). This scheme was initially set up (in 1998) by the industry for crop production, but since 2001 has also a module for beef production. In 2003, it had about 2,000 members, representing 300,000 heads of cattle and 900,000 heads of sheep. The scheme is approved to use the Red Tractor logo.

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[47] Main founders: National Farmers Union (NFU), National Sheep Association, National Beef Association, Livestock Auctioneers Association, and the British Meat Federation (which represents mainly meat processors/ and wholesalers).

- Freedom Food (FF). Freedom Food is the RSPCA's farm assurance and food labelling scheme. It is the only specific animal welfare scheme in the UK, which has as its aim to improve the lives of as many farm animals as possible. The Freedom Food scheme has currently 121 members for beef cattle (and 7,323 animals). In 2001, there were 670 members for beef cattle. This number has declined due the outbreak of Foot and Mouth Disease.
- Soil Association Farm Assurance Cattle and Sheep (SAFA). The Soil Association is the oldest and largest body for organic production. In January 2005, there were 35,000 heads of beef cattle assured by this scheme.
- Since there is no veal production in the United Kingdom, there is no quality assurance scheme for veal production present. Similar farm assurance schemes to those in England, as described above, operate across Scotland, Wales and Northern Ireland.

Conclusion

With the exception of Norway, all countries have three different levels of quality assurance schemes. Norway has a basic quality assurance scheme and an organic scheme. France, Italy and Sweden have basic and top quality assurance schemes and organic production. In the Netherlands, there are basic quality assurance schemes, specific animal welfare schemes and organic production. In the United Kingdom, there are top quality assurance schemes, specific animal welfare schemes and organic production. In France, Italy, Sweden and the United Kingdom, there are several schemes present that operate on a regional basis. The schemes that are operational in the Netherlands and Norway operate on a national basis. Table 18.6 summarizes the presence of the different types of quality assurance schemes for dairy and beef production in the different countries.

Table 18.7 summarizes the existence of quality assurance schemes for veal production in France, Italy and the Netherlands. So far, there are no organic schemes for veal production. In Italy there are no quality assurance schemes for veal at all. France and the Netherlands have basic quality assurance schemes for veal. In France, there are also top quality assurance schemes for veal, mainly based on traditional ways of production, such as maternally nursed veal, either on specific geographical locations (Aveyron) or using specific breeds (Limousine). In the Netherlands, there is a specific animal welfare scheme for veal, developed by a Dutch veal integrator to fulfil consumer demand.

The first case study demonstrated that the development of national animal welfare legislation and the development of quality assurance schemes is interrelated with regards to the pig sector. On the one hand, there are countries (such as France and the Netherlands) with moderate national animal welfare legislation, which raises the level of animal welfare by way of the market, resulting in various quality assurance schemes. On the other hand, countries such as Norway and Sweden have stringent national animal welfare legislation, where animal welfare is perceived as the responsibility of the government and where only few animal welfare schemes are developed.

TABLE 18.6 Occurrence of quality assurance schemes for beef and dairy production in France, Italy, the Netherlands, Norway, Sweden and the United Kingdom.

Level of schemes	France*	Italy	Netherlands	Norway	Sweden*	UK
Organic	L'Agriculture Biologique (b + d)	Organic (b+d)	Biologisch (b+d)	Debio (b+d)	KRAV (b+d)	SA (b+d)
Specific AWS	-	-	CONO (d) Scharrel (b)	-	-	Freedom Food (b+d)
Top quality scheme	Label Rouge Blason Prestige(b)	LAIQ (d)QC (b)	-	-	Swedish Milk (d) Husdjurs-föreningarnas Friskko (d) Several schemes from dairies (d) Swedish Meat Gourmé (b) Felfri hud (b+d) SvDhv Nöthälsan (b+d)	NDFAS (d) EFSIS-FABBL (b) ABM (b) ACCS (b) GQ (b+d) Several regional schemes for beef (b)
Basic quality scheme	Charte des Bonne Pratiques (b+d) Epoisse PDO (d)	PDO Parmigiano-Reggiano (d) IGP Vitellone Bianco dell'Appenino (b) CONAZO (b)	KKM (d)IKB Beef (b)	KSL (b+d)	Several schemes from slaughterhouses (b) MHS (b+d) Naturbeteskött (b)	-

Note: * Schemes mentioned first are most important; (d): Scheme for dairy production; (b): Scheme for beef production; (b+d): Scheme for beef and dairy production

In the cattle sector this relationship is less clearly visible. As was described in Section 18.2, Norway, Sweden and the United Kingdom have more stringent animal welfare legislation for cattle than France, Italy and the Netherlands. But there is little difference between the countries in terms of the occurrence of quality assurance schemes for dairy and beef. The lack of public concern about animal welfare in the more extensive production types such as dairy and beef farming can give some possible explanation. Without public concern, there is neither a political driver for stricter animal welfare legislation, nor a market niche that would encourage agribusiness to develop quality assurance schemes.

There is considerable public concern for the welfare of veal calves. This has led to specific animal welfare legislation for calves in the EU. The Dutch veal integrator has developed the Peter's Farm scheme to meet consumer demands for a better animal welfare for veal calves. In France, there is no public concern and little reason for French top quality schemes to incorporate animal welfare specifications. French top quality schemes mainly focus on high quality of the products, and not on animal welfare.

TABLE 18.7 Occurrence of different levels of quality assurance schemes for veal production in France, Italy and the Netherlands.

Level of schemes	France*	Italy	Netherlands
Organic	-	-	-
Specific AW	-	-	Peter's Farm
Top quality scheme	Label Rouge Blason Prestige IGP Veau d'Aveyron et du Ségala	-	-
Basic quality scheme	Veau de Boucherie	-	IKB Veal

Note: Schemes mentioned are most important.

19

PARTICIPATION IN ANIMAL WELFARE SCHEMES

This chapter describes the motivations of farmers to participate in quality assurance schemes and the experienced and expected advantages and disadvantages of participation. In doing so we compare farmers across countries and across quality assurance schemes.

19.1 MOTIVATIONS TO ENTER A QUALITY ASSURANCE SCHEME

Most farmers knew about their scheme through information by the host of the scheme or by their buyer. Besides, government material, agricultural magazines, farmer study groups and the farmer's unions were important sources of information.

Broadly speaking, there are three types of motivation that farmers referred to when explaining why they decided in favour or against participation in one of the quality assurance schemes.

Nearly all farmers referred in one way or another to *market-related motivations* (M). They participated in a scheme because participation gave access to a market or improved their position in the market. Sometimes it even resulted in a higher price as participation is rewarded by the payment of a price premium. Often participation allowed for a distinction in the market but especially for the basic quality assurance scheme, participation was considered more or less mandatory, as the buyer demanded it as proof of quality and would either not buy or only against a lower price in case of non-participation.

In addition, especially farmers in basic and top quality assurance schemes explained their choice by referring to *society-related motivations* (S). They felt pressured by society to account for their way of production by following certain guidelines but also by allowing outsiders to watch and check their way of production, by making agricultural production transparent and traceable.

Farmers who entered specific animal welfare and organic schemes often referred to their own *ethical motivations* (E). It was important to them personally to produce in a way that safeguards the animals' welfare and the environment. In doing so, most of them also expressed their wish to distinguish themselves from conventional production and to farm in a different way.

Across the six countries, farmers in the basic and top quality assurance schemes were mainly driven by market or society-related motivations. Farmers in the specific animal welfare or organic schemes were mainly driven by ethical motivations, although market-related motivations were certainly considered important as well. Table 19.1 gives a cross-country overview of farmers' motivations to participate in the different quality assurance schemes.

When comparing across countries the similarity in motivation is notable. Apart from in Italy, most farmers in the basic quality assurance scheme considered scheme participation to be not a voluntary act. Legally speaking, participation was not mandatory but as it regulated market access, it was nearly impossible to refrain from participation in their view. Buyers either refused to buy uncertified animals/products or they would only buy them against serious price cuts. Moreover, participation in a basic quality assurance scheme was sometimes obligatory before entrance into a top quality assurance scheme. But most farmers in basic quality assurance schemes considered participation an important tool to account for their good agricultural practices towards consumers. Furthermore, they perceived the scheme a good mechanism for control to guarantee quality and fair competition by revealing those farmers who do not operate according to good agricultural practice.

In Italy, it was more common for farmers to produce outside a quality assurance scheme. Italian farmers who entered a basic quality assurance scheme were mainly motivated by financial benefits, such as premium and guarantee prices, or by a more secure position in the market. But Italian farmers also referred to their wish to produce extra quality and to be recognized for being a high quality producer. In the other countries, the latter motive was most often to be found among farmers who entered a top quality assurance scheme. For Swedish farmers, it was also important that top quality assurance schemes offered extra benefits such as an agricultural advisory system or access to insurance in the Swedish milk salmonella scheme.

Only the Netherlands and the United Kingdom had a specific animal welfare scheme. Farmers who entered these schemes explained their decision by ethical concern for animal welfare. But they were also motivated by price premiums or their regular buyers' insistence to participate in the scheme.

Similar to farmers in the specific animal welfare schemes, most organic cattle farmers were motivated to become organic farmers primarily for ethical reasons. However, these ethical motives did not always reflect a concern for animal welfare. A lot of them worried about the environment and food safety especially. They referred to animal welfare mostly

TABLE 19.1 Farmers' motivations to enter a quality assurance scheme.

	Basic quality assurance scheme	Top quality assurance scheme	Specific AW scheme	Organic
France	• Guaranteed minimum price (M) • Provides financial benefit (M) • Improves farmer's image (S) • Secures farmer's license to produce (S)	• Provides financial benefit (M) • Provides a better position in the market (M) • Quality and traditional image of the products (S)	-	• Provides financial benefit (M) • Concern for environment and food safety since BSE crisis (E)
Italy	• Provides a reliable buyer (M) • To produce higher quality, this provides better position in the market (M) • Improves farmer's image (S)	Same as farmers in basic scheme, plus: • Scheme offers possibility to communicate with consumers about farmer's practices. This improves farmer's image (S)	-	Same as farmers in top scheme, plus: • Concern for environment, food safety, animal welfare and animal health (E)
Netherlands	• Buyer requirement, a financial reduction if not participating (M) • Raises quality production whole sector (M) • Provides better image (S)Provides communication towards consumers (S)	-	• Price premium (M) • Concern for animal welfare (E)	• Distinction in the market (M) • Aversion from conventional practice (E) • Concern for environment (E)
Norway	• Buyer requirement, a financial reduction if not participating (M) • Raises quality production whole sector (M)	-	-	• Aversion from conventional practice (E) • Concern for environment (E)
Sweden	• Buyer requirement, a financial reduction if not participating (M)	• Price premium (M) • Advisory system (M) • Insurance (M) • Buyer requirement (M) • Increase knowledge and control over production (M)Belief in cooperative ideology (E)	-	• Price premium (M) • Buyer requirement (M) • Ideology concerning animal welfare and environment (E) • To keep consumers' trust (M)
United Kingdom	-	• Buyer requirement, a financial reduction if not participating (M) • Better position in the market (M)	• Buyer requirement (M) • To produce higher quality (M) • Concern for animal welfare (E)	• Provides a better position in the market (M) • Provides financial benefit (M) • Concern for animal welfare and food safety (E)

indirectly: animal welfare was seen as a prerequisite to a healthy farming system, which would lead to quality production, better performance and less need for medication.

Dutch organic beef farmers often hired land from nature conservation organizations and their requirements were very close to the specifications of organic production schemes. French and British organic farmers often referred to the BSE crisis as a reason for becoming organic. The BSE crisis had undermined their trust in conventional feed, and that was the most important reason for turning towards organic agriculture.

19.2 BARRIERS TO SCHEME PARTICIPATION

In order to understand what prevented farmers from participating in a scheme, we contacted farmers who did not participate in any scheme and asked about their reason to stay out of them. Where it was difficult to find non-participants (for instance, in the Netherlands), we asked farmers about their reasons for not participating in a scheme with more stringent animal welfare regulations. Finally, we asked farmers if it was still possible in their view to produce outside a quality assurance scheme.

Italy was a special case as there were far more cattle farmers producing outside schemes compared to any of the other countries. Across all the other countries, there were only eight farmers in the whole sample who did not participate in any scheme. Most of them did not participate because they considered quality assurance schemes as an instrument of the agribusiness sector to increase power, control and bureaucracy at the expense of farmers' autonomy. They doubted the benefits of entering a scheme, especially if it did not pay an extra price for the extra effort. In their view, being a good farmer and producing quality products was not necessarily related to being a participant in a scheme.

When a scheme was hosted by a chain collaborator that was not the regular buyer of a farmer, farmers were forced to switch between buyers before they were able to participate in the scheme. This could be a barrier for farmers. Especially when farmers operated in a cooperative firm, they could not easily switch between buyers. There could also be limitations with the host of the scheme. This was the case in the Dutch specific animal welfare scheme. The cheese factory that hosts the scheme is too small to handle more milk and is therefore reluctant about accepting new milk suppliers. When it came to organic schemes, distrust in the economic viability of the scheme and the restrictions of the scheme in the use of concentrates, medicines, fertilizers and eradicants were important barriers for scheme participation.

Farmers from the Netherlands, Norway, Sweden and the United Kingdom were also asked if they considered it possible to produce outside a quality assurance scheme. Farmers were fairly unanimous in their negative response. Although legally speaking it is not mandatory in any of those countries, farmers considered it practically impossible, as most buyers today demand product certification. In their opinion, there were still some chances for small farmers who sold their products to buyers who did not require certification. Swedish beef producers seem to be in a slightly better position as there are only a few and slaughterhouses do not want to impose too many regulations because they are dependent on the delivery of cattle. For Dutch beef farmers, the situation was slightly different because the termination of the beef basic quality assurance scheme was under discussion right at the time of interviewing. These farmers felt that the sector needs a basic quality assurance scheme to show to buyers and consumers that beef farmers produce quality beef. In their view, the current basic quality assurance scheme should be replaced by a code of conduct to guarantee quality production in case it would indeed be closed.

19.3 IMPACT OF SCHEME PARTICIPATION ON FARM MANAGEMENT

To get an idea of the impact of scheme-participation, we asked farmers about the impact of scheme regulations on farm management, administrative workload, production costs, transfer costs, and market position, and about the control regime of the scheme.

In general, farmers considered more transparency of agricultural product an important advantage of quality assurance schemes as more transparency would benefit the image of agriculture among the general public. But many farmers appreciated the scheme specifications also as a tool for themselves to reflect on their farming practices and to stay alert about their own farm practices and to make adjustments when necessary. This made a quality assurance scheme a true safeguard for high quality production in the opinion of farmers. Furthermore, they recognized that quality assurance schemes were the key to market access in modern agriculture. On the other hand, they referred to the disciplinary effect as the most important disadvantage of scheme participation and to being forced to produce according to scheme specifications, which could be time and labour consuming, or not directly beneficiary to farmers. Some farmers considered the need to justify their farming practices through quality assurance schemes, a sad proof of society’s distrust.

Restrictions on Farm Management

Farmers were asked if the scheme specifications limited them in their freedom to manage their own farm. According to most farmers this was not the case. Of the Italian farmers, about 10 per cent said that the scheme specifications restricted them in their farm management. Some Norwegian and Swedish farmers argued that since the scheme provided them with more information about their farm management working in a scheme improved their farm management. Dutch farmers were unanimous in their views that the scheme specifications did not limit their freedom to manage their farm. The majority of Swedish farmers did not feel too restricted by the scheme specifications. Most of them consider the regulation as realistic, relevant and necessary to warrant good production.

Nine out of 62 British farmers felt that the scheme specifications did restrict their freedom to manage their own farm. Twelve out of 62 farmers said that the specifications did have an influence on their farm management but, like the Norwegian farmers, they saw this more as an improvement of their farm management. Scheme specifications that were considered to be restrictive were generally time or labour consuming, or did not directly benefit the farm.

Administrative Workload

We also asked farmers if participation in their scheme increased the administrative workload of the farmer. There was a large variation in answers of farmers across countries and across schemes. The organization of the individual schemes highly influenced farmers' answers.

Of the Italian farmers, 34 per cent thought that the bureaucracy and administration increased a lot with scheme participation. Likewise, most Dutch dairy farmers felt that their participation in a scheme had increased their administrative workload. The same was true for one out of two Dutch veal farmers. Dutch beef farmers, however, did not feel that their administrative workload was affected by the scheme. Most of the Swedish farmers thought that participating in a scheme increased the amount of paperwork.

Production Costs

When it comes to production costs, farmers who worked in a specific animal welfare scheme or organic scheme sometimes experienced a cost increase. This was mainly because the scheme specifications demanded the use of more land or more labour, or caused lower yields or production efficiency. Farmers in basic or top quality assurance schemes found it difficult to say whether or not the scheme increased production costs.

Transfer Costs

Some schemes required adjustments on a farm and these adjustments required investments. Also, farmers had to be audited before they were allowed in the scheme, this also gave costs. These costs can be seen as transfer costs and can be an obstacle for farmers to participate in a scheme. In general, farmers did not feel that the scheme had high transfer costs. Swedish and British farmers who worked in specific animal welfare or organic schemes were the exception; they complained about high transfer costs and especially the costs for scheme membership and auditing were considered to be too high.

Market Position

Farmers were asked if quality assurance schemes improved their position in the market, either by market access or premium prices.

About half to two-thirds of the farmers in Italy, Sweden and the United Kingdom were positive that participating in a scheme improved their position in the market.[48]

Dutch farmers were more pessimistic about the market effect of quality assurance schemes. Only the five organic beef farmers in the Dutch sample felt that the scheme had improved their position in the market. The other farmers did not experience directly any real improvement in market position. Some of them explained that the scheme improved the position of the agricultural industry (slaughterhouses and dairies) primarily through the increasing quality and uniformity of products. This could improve eventually and indirectly the market position of Dutch products of which also farmers would profit. This difference in perception can be explained by the fact that Dutch beef producers often market their own products at the farm gate or through farmer markets. Certification adds little value in these markets.

Control Regime

The farmers in most schemes and in most countries were controlled and certified by an independent certification body. Usually a farm was audited once or twice a year. This meant an inspection of the condition of the stables and a check on the paperwork of the farmer. Inspections could either be expected or unexpected. Some schemes involved an additional inspection of animal health and welfare on the farm carried out by veterinarians. Exceptions to this are the Norwegian KSL scheme, where farmers can expect to be inspected once every tenth year (Groven et al., 2004), and the Swedish MHS scheme. Both schemes work with a self-control system where farmers audit themselves. In the control regime of the schemes animal welfare is often one of the subjects in the inspection.

Farmers considered as strong points of the inspections that:

- the inspections were unannounced;
- in some cases samples from the farm (urine, feed) were analyzed in a laboratory;
- the inspections detected farmers who did not operate according to good agricultural practices, and thus provided a quality guarantee for consumers and buyers as well as for fair competition for farmers.

[48] Considering that 50 per cent of the Italian sample were farmers who did not participate in a scheme implies that either all Italian farmers in quality assurance schemes experience improvement in their market position or farmers who do not participate in a scheme have high expectations of scheme participation.

Farmers thought that the following points were the weaknesses of the control regime.

- The controls were inefficient. Farmers often felt that inspectors from different agencies inspected the same things.
- Inspections were too much focused on paperwork and not on the actual conditions of the farm.
- Some farmers experienced the controls as belittling or as a proof of distrust.
- Sometimes inspectors had no specific knowledge of animal production.
- Sometimes farmers felt that inspectors were too strict and that there should be more room for farm-specific solutions and flexibility.

19.4 CONCLUSION

The overall experience of cattle farmers with quality assurance schemes were quite similar across the six countries. The motivations of farmers to participate in basic or top quality assurance scheme were mainly driven by market or societal considerations. Furthermore, farmers operating in basic quality assurance schemes often felt that they had little choice, because participation was demanded by buyers. Farmers felt that it was only possible to work outside a scheme for small-scale farmers who sold their products in niche markets and to buyers who did not demand scheme participation. Ethical motivations were often important for farmers' decisions to participate in specific animal welfare or organic schemes, arising from concerns with the modern practices of agriculture; in addition, they often hoped to improve their market position. As part of the ethical motivations of organic cattle farmer, environmental concerns were more often mentioned than concerns for animal welfare.

Barriers for farmers to participate in more stringent animal welfare schemes were first of all the limited freedom for farmers to switch between buyers, as farmers often worked with long-lasting contracts or in farmer cooperatives. Other barriers were distrust in the economic viability of a scheme of difficulties to fulfill the extra specifications of the scheme.

In general, cattle farmers thought that quality assurance schemes brought more transparency in agricultural production. This improved the image of agricultural production among the general public and also informed farmers about their management and enabled them to reflect on their farming practice. Many cattle farmers also considered quality assurance schemes as the key to market access in modern agriculture. Some farmers worried about society's distrust of farming practices and the resulting need of farmers to justify their practices through quality assurance schemes. As most important disadvantages of quality assurance schemes, farmers referred to the disciplinary effect of scheme specifications, which could be time and labour consuming, or not directly beneficiary to the farmer.

In general, however, cattle farmers did not consider the scheme specifications as too restrictive for their farm management. Farmers worried most about the increased administrative workload although the variation in answers across countries and schemes was considerable on this point. Most farmers from basic and top quality assurance schemes (with the exception of Italian farmers) did not feel that scheme participation lead to higher production or transfer costs. Farmers from specific animal welfare and organic schemes had a different opinion on this point. Especially Swedish and British farmers participating in specific animal welfare and organic schemes perceived their transfer costs as high. Many cattle farmers across the countries thought that scheme participation improved their market position. Generally, cattle farmers accepted the control regime of their scheme although efficiency of inspections and the practical knowledge of the inspectors could certainly be improved in their view.

20

FARMERS' PERCEPTIONS OF ANIMAL WELFARE

This chapter reports on farmers' perceptions, evaluations and assessments of animal welfare and their readiness to adapt farming methods in order to improve the welfare of their animals. In some countries, the researchers also discussed farmers' more general notions of good farming practices and their relationship with animals.

20.1 GOOD FARMING

Definition of Good Farming

In France, the Netherlands and Norway, the researcher asked farmers when they considered a colleague to be a good farmer. Farmers across all three countries and all quality assurance schemes considered taking good care of animals as an important characteristic. Most farmers referred to its affect on farm results and, thus, farm income. When animals were not taken care of properly, farm results suffered and income decreased. Nearly two-thirds of French farmers thought that a good farmer liked animals, took good care of animals, and was observant. The second-best characteristic was to farm with good technical results, such as growth of the farm and high milk production. Again, this was linked to taking good care of animals in the view of farmers since taking good care is a precondition for getting good technical results. Third, a good farmer was expected to achieve good financial results.

Dutch farmers too considered good care of animals as the main aspect of good farming. The second and third most important characteristic differed for dairy, beef and veal farmers in the Netherlands. For dairy farmers, the second most important aspect of a good farmer was the ability to earn a good income, followed by care for the land. For beef farmers the second most important quality was entrepreneurship, and the capability to market their products. The third most important quality of a good farmer was to get good zoo-technical results. Veal farmers, who generally work on a contract basis, referred to good technical performance, with good growth rate and good colouring of the meat as the second most important characteristics of a good farmer. These were also the aspects by which they were judged and rewarded by their contractor. Veal farmers thought that the third most important aspect of good farming for veal farmers was the ability to earn an income through raising veal. This was closely related to the ability to get good technical results.

For Norwegian farmers, the main quality of a good farmer was to take good care of his animals too, followed by running the farm well and to take good care of his land. All these qualities were combined in good stewardship and the ability to preserve the farm and the land for future generations. In addition, some Norwegian farmers mentioned the ability to perform different types of work, to like farm work and to keep on learning about new techniques and regulations.

Farmers' Priorities

We also asked farmers to rank five different aspects of farming. The five aspects were (in alphabetical order): animal health, animal welfare, economic and financial result of the farm, environment, and food safety. Farmers were asked to score each aspect as very important, important, neutral, unimportant, or very unimportant. Most farmers considered this a very difficult choice as all these aspects were considered important and interrelated. According to the farmers, animal welfare was important for animal health, which again impacted on the economic results of the farm by increasing the animals' performance and by reducing veterinarian costs. In addition, animal health/welfare affected food safety in their view because of medicine residues but also because of bacteria transmission and hygiene. Having said this, farmers started scoring the farming aspects.

We weighed the score from 5 (very important) to 1 (very unimportant) and calculated the average score per aspect. By comparing the average scores it is possible to rank the farming aspects. This gives a rough indication of differences between farmers from different countries. The ranking of the five different farming aspects and the average score per country is summarized in Table 20.1.

In general, animal health received the highest score, while environment received the lowest score, except in France where economic results received the lowest score. However, when asked about farmers' priorities in an open question, most French farmers appointed the

Table 20.1 Average rank of the farming aspects animal health, animal welfare, economic farm result, environment, and food safety, per country.

Rank	Italy*	France	Netherlands	Norway	Sweden	UK
++	Animal health	Animal health	Animal health	Animal health	Animal health	Animal health
+	Animal welfare	Animal welfare	Food safety	Food safety	Food safety	Animal welfare
+/-	Economic results	Food safety**	Animal welfare	Animal welfare	Animal welfare	Economic results
_	Food safety	Environment	Economic results	Economic results	Economic results	Food safety
_ _	Environment	Economic results	Environment	Environment	Environment	Environment

Notes: * In Italy, farmers were asked to rank the five farming aspects instead of scoring them; ** in France the farmers weren't asked about food safety but about the diet of the animals.

farm's financial result as their top priority, followed by animal welfare, animal health and general running of the farm.

20.2 RELATIONSHIPS WITH ANIMALS

The interviews with cattle farmers showed that farmers have different relationships with animals. Here the difference in farm practice between dairy, beef and veal farming proofed to be of great importance. Dairy farmers are in close contact with the animals during milking and therefore their relationship with animals is important. It matters for the safety of the farmer and the easiness of milking if animals trust the farmer, are tame and easy to handle. In many countries, dairy farmers breed and raise their own milking cows, often using bloodlines that were founded by their own parents, going back to animals they themselves grew up with. This is an extra, emotional tie between the farmer and his animals. In Norway, however, dairy farmers do not breed their own animals, so this is not the case for Norwegian farmers.

In the Netherlands, there was a difference between organic and conventional dairy farmers in the perceptions of and attitudes towards cows. Organic farmers were more inclined to see the herd as the basal unit, instead of the individual cow. Organic farmers generally appreciated cows not only for their milk production but also for the role they have in the ecological system of the farm. Non-organic farmers took pride in knowing each individual cow, sometimes even with their pedigree.

When cattle farmers felt related to an individual animal, these were most often animals with 'a story' or with especially good characteristics like easiness to handle or milk production. Farmers also recognized that the animals enabled them to maintain the lifestyle of a farmer. For most dairy farmers, the relationship with their animals was emotional; farmers felt joy, love, responsibility and appreciation for their animals. But they never forgot that the animals were also a means to gain an income for the farmer – they were never considered as pets. Some Norwegian and Swedish farmers mentioned that they felt that their relationship to the animals had become less close compared to the past when they had fewer animals.

Beef farmers reacted in a similar way to dairy farmers. Suckling cows spent a long time on a farm as well, and were sometimes bred by the farmer too. Both stimulated the development of a close relationship. But daily contact was not as intensive as with dairy cows, except for maternally nursed veal in France. Bull farmers talked about their animals in terms of respect. These farmers never got too close with these animals for safety reasons, but had great respect for the animals, which in their perception was mutual. Dutch and Swedish bull farmers also spoke about their animals in terms of beauty.

Veal farmers had different relationships with their animals. In their views, animals were primarily a means to gain income. Veal calves stayed on a farm for a short period of time and generally there were many animals present on a veal farm. This inhibited the development of a special relationship with the animals.

> 'Every calf is being thought of, but there is no individual attention for each calf, unless they are ill' (Dutch veal farmer).

Veal farmers felt responsible to take good care of the animals, but ultimately the animals were there to earn a living. French farmers indicated that the status of veal calves had improved with the switch from individual housing to group housing. According to them the calf 'is no longer a meat machine'. The status had improved from the status of 'production factor' to 'production animal'.

20.3 ANIMAL WELFARE

Definition of Animal Welfare

We asked farmers what animal welfare was in their opinion and how they would define it. Comparison across quality assurance schemes showed that scheme participation mattered for their definition of animal welfare, but there was also a clear difference between sub-sectors. In all countries apart from the Netherlands and France, farmers who operated in specific animal welfare or organic schemes defined animal welfare in a different way compared to farmers in basic and top quality assurance schemes. Whereas the first group of farmers described animal welfare in terms of natural behaviour, the other group focused mainly on animal health, good care and living conditions for the animals and absence of stress.

Notable was also that farmers from different sub-sectors defined animal welfare differently in the Netherlands, Norway and Sweden. Beef farmers and especially suckling cow farmers considered natural behaviour an important condition for animal welfare. Veal farmers in France, on the other hand, did not refer to behavioural conditions at all, while veal farmers in the Netherlands tended to look at living conditions and animal health when describing animal welfare.

In the Netherlands, there was no difference between farmers from different quality assurance schemes, neither was there in France. Most French farmers considered comfort and freedom of movement as the most important conditions for animal welfare. They referred to good ventilation, good bedding and being reared in freedom. Organic farmers focused on natural conditions for the animals but also on good feeding rations, clean animals, and good health. Few farmers mentioned psychological aspects, such as a good relationship between farmer and animal and a stress-free environment. Behavioural aspects (such as eating, resting and space to roam) were not mentioned at all by the few farmers with indoor production.

In Italy, farmers in basic and top quality assurance schemes defined animal welfare in a different way compared to farmers in organic schemes, but there were no differences between dairy, beef and veal farmers. Farmers in basic and top quality schemes referred mainly to animal health or the absence of stress; in their view, animal health, absence of stress and animal welfare were directly related to the performance of the animals. The Italian organic farmers defined animal welfare by the possibility for the animal to express natural behaviour.

In the Netherlands, farmers from different quality assurance schemes generally agreed on their definition of animal welfare, but there was a difference between farmers from various sub-sectors. Dairy and veal farmers both defined animal welfare by the living conditions for the animals, followed by an absence of stress and good animal health. Dutch beef farmers considered animal welfare as good when the animals had a natural life with the possibility to express natural behaviour. Moreover, animals had to be well taken care of and be free of stress.

In Norway, there was little difference of opinion about the definition of animal welfare. The opportunity to express natural behaviour was most often referred to by organic farmers and farmers with suckling cows. For the rest of the farmers, neither scheme participation nor sub-sector seemed to matter for animal welfare definition. Half of the interviewed farmers described animal welfare as animals 'feeling good'. Most farmers thought that good feed and water was of main importance for this as well as good animal management or, more specifically, enough time spent with the animals in order to observe them and relate with them; in addition, the provision of good living conditions was considered important, such as good, clean stables and the possibility to be outdoors. Some Norwegian farmers worried that the difficult economic circumstances in agriculture forced them to spend less time with the animals, because they had to combine farming with off-farm work, among others reasons. A few farmers remarked that the expression of natural behaviour was always limited by the possibilities of the production system. Some farmers said that animal welfare was indicated by good production of the animal as no animal could perform well when not faring well.

The Swedish definition of animal welfare was influenced by scheme participation as well as the cattle sub-sector. In total, three different definitions of animal welfare were found among Swedish farmers. The most frequent definition was a 'basic' definition in which animal welfare was translated as the animals feeling well and their biological needs being met. Some farmers thought that animal welfare supported the performance of the animals, leading to good economical results for the farm. The second definition focused on natural behaviour. Farmers referring to this definition considered animal welfare as best taken care of when animals could express the same behaviour as non-domesticated animals would do. The third definition centred on care-taking. Farmers who defined animal welfare as taking good care of animals considered the farmer–animal relationship as essential for animal welfare. The second definition was most frequently found among farmers participating in organic schemes, while farmers from the basic and top quality assurance schemes used most often either the third or the first definition. Likewise, beef farmers or combined beef–dairy farmers referred most often to either the third or the second definition, while specialized dairy farmers referred generally to the first type.

In the United Kingdom, farmers differed in their definition of animal welfare according to scheme participation but not cattle sub-sector. Most farmers defined animal welfare as good care for the animals, as a result of good feeding rations, dry and clean stables, absence of diseases and a comfortable environment. Some farmers participating in top quality schemes believed that animal welfare was best when the animals were in good health and looking well. Farmers participating in specific animal welfare and organic schemes mentioned the same aspects as the other farmers, but also referred to the five freedoms and the ability of animals to express natural behaviour.

Most Important Aspects of Animal Welfare

Next to the open question about animal welfare, farmers were asked to name their top three out of the following 10 aspects of animal welfare:

- freedom of prolonged hunger, thirst or malnutrition;
- physical comfort and safety;
- absence of injuries;
- absence of disease;
- absence of pain;
- the animal can perform normal/natural social behaviour (e.g. grooming, huddling for warmth);
- the animal can perform normal/natural other behaviour (e.g. play, exploration, foraging);
- good human–animal interaction;
- absence of fear and stress;
- something else: ….

The aspect that a farmer put first received weighing factor 3, the aspect in second place weighing factor 2, and the aspect in third place weighing factor 1. By calculating the average weighing score for each aspect, animal welfare aspects could be ranked for each country. Most farmers pointed out that choosing a top three was difficult as all 10 aspects were important for animal welfare and were interrelated and, thus, should not be separated into singular elements. Some farmers refused to put the animal welfare aspects in order or were unable to make a choice. Table 20.2. represents the ranking of the animal welfare aspects by the farmers that were able to choose between the animal welfare aspects.

Most farmers put the freedom of prolonged hunger, thirst or malnutrition on the top of the list. This aspect was seen as a basic condition for rearing animals. If this condition was not

TABLE 20.2 Ranking of aspects of animal welfare per country.

	Italy*	France	Netherlands	Norway**	Sweden	UK***
1	No hunger	No hunger	No hunger	No hunger	No hunger	No hunger
2	Physical comfort	Absence of stress	Absence of stress	Absence of stress	Absence of stress	Absence of disease &
3	Absence of stress	Absence of pain	Absence of disease	Absence of disease	Absence of disease	Absence of injuries
4	Absence of injuries & Absence of disease & Absence of pain	Absence of disease	Social behaviour	Absence of injuries	Absence of pain	Physical comfort
5	Social behaviour	Human-animal interaction	Physical comfort	Human-animal interaction	Social behaviour &	Absence of pain
6	-	Absence of injuries	Human-animal interaction	Absence of pain &	Human-animal interaction	Social behaviour
7	-	Physical comfort	Absence of pain	Social behaviour	Physical comfort	Natural behaviour
8	-	Social behaviour	Absence of injuries	Natural behaviour	Natural behaviour	Human-animal interaction &
9	-	Natural behaviour	Natural behaviour	-	Absence of injuries	Absence of stress
10	-	-	Something else: Grazing	-	Something else: Use of natural breeding methods	Positive emotions

Notes: * In Italy, farmers were asked to rank these five aspects of animal welfare instead of selecting a top three from 10 different aspects of animal welfare; ** in Norway, 'physical comfort and security' was not listed among animal welfare aspects; *** in the United Kingdom, the option 'something else' was replaced by 'positive emotions'.

met, farmers felt they failed in their duty to take care of the animals. This was followed by the absence of inconveniences as disease, injuries, pain or stress, and, third, less 'vital' conditions such as physical comfort, the possibility to perform natural social or other behaviour, and good interaction between animal and farmer. In addition, farmers pointed out that some criteria were implied in others once an improvement in one of the aspects was achieved.

20.4 IMPORTANCE OF ANIMAL WELFARE

Generally, farmers considered animal welfare an important aspect of farming, although it might not be listed as their first priority. Most farmers considered it natural for a good farmer to take good care of their animals. Some farmers said that a farmer's ability to take good care of animals was limited by the economic situation. Farmers in France, the Netherlands, Norway and Sweden were asked specifically why they considered animal welfare to be important. The direct influence of animal welfare on animal health and, thus, animal performance was an important reason as it would also impact on the farm's financial results. In this way, it was considered to be in the best interest of farmers to protect animal welfare. Farmers also referred to the fact that farmers feel responsible for their animals and obliged to take good care of them. Finally, it was considered important to take care of animal welfare as it influenced the image of the sector and consumer trust. As we have seen before, these were also important reasons for farmers to participate in animal welfare schemes.

20.5 ASSESSMENT OF ANIMAL WELFARE

When asked how they assessed the welfare of their own animals, farmers most often referred to animal-based characteristics, but also to characteristics of the living environment of the animals. They generally used the following four categories of animal-based indicators:

- behaviour;
- appearance;
- zoo-technical performance;
- health.

Farmers expected animals to fare well when they displayed peaceful, calm, playful or social behaviour. The act of ruminating was seen as a sign that an animal is peaceful and has good welfare. Farmers worried about the welfare of an animal when it behaved different from normal for this particular animal or differently compared to the other animals in the herd.

When it comes to appearance, the fur of the animal was seen as an important indicator of animal welfare. A shiny, smooth coat was considered to be a sign of good animal welfare; pale, rough and dirty fur indicated that there was something wrong with the animal. Also the general expression of the animal, its posture when standing or lying, positioning of the eyes and ears, were used by farmers to detect animal welfare.

The zoo-technical performance of an animal was also seen an important indicator of welfare, expressed by, for instance, feed intake, growth and milk production.

When an animal was in bad health as a result of disease or any injuries its welfare was considered to be low.

Farmers also referred to characteristics of the living environment of the animals. For a good animal welfare, the living environment of the animals had to be comfortable and stress should be avoided. Farmers used the following indicators to check the environment:

- quality of the housing conditions: space for the animals, bedding material, climate in the stable, outdoor access, quantity and quality of the feed, etc.;

- prevention of stress: the treatment of animal by the farmer and provision of stress reducing measurements, such as music to avoid disturbance through sudden sounds.

Some farmers said that the handling of animals by the farmer is even more important for animal welfare than the direct living conditions of the animals.

20.6 IMPROVING ANIMAL WELFARE

Most farmers across countries considered the level of welfare of their animals good, although some improvement could still be made.[49] Veal farmers had already made major adjustments on their farms quite recently in order to comply with the EU directive for animal welfare among veal calves; these farmers showed little motivation for further improvements.

Farmers appointed mostly the following four areas for possible improvements:

- better ventilation or climate in the stable;
- more space for the cows (both for lying, grazing and for cow traffic);
- change from tethering systems to free-range stable systems;
- to provide softer walking or lying surface.

A few farmers were actually planning to introduce these improvements. But most farmers felt constrained by their financial possibilities, labour constraints, physical barriers on the farm or because their plans conflicted with the building plans of their municipalities.

Especially farmers from Norway and the United Kingdom mentioned that animal welfare could be improved if farmers would have more time to spend with their animals. Many of them farm on a part-time basis. They feared that the ongoing trend of scale enlargement would delimit further the attention given to the individual animal. Enough time and enough attention for the individual animal were essential for ensuring animal welfare in their view. Many farmers were forced to make considerable investments in order to comply with regulations but felt threatened by what they called the 'short-sightedness' of politicians.

[49] The exception to this is Italy where only 17% of the farmers are satisfied with the current level of animal welfare.

20.7 KNOWLEDGE OF ANIMAL WELFARE

Most farmers thought that their knowledge of animal welfare was good, or at least sufficient, and they did not feel that they needed extra information. Their knowledge derived from their own professional experience and contacts with colleagues. In addition, professional magazines and external advisors from feeding companies, slaughterhouses, veterinarian or other advisory agencies were mentioned as important sources of information.

The role of the veterinarian for animal welfare was evaluated differently by farmers across countries. Italian and Dutch farmers referred to the veterinarian as a good source of knowledge for animal health but not animal welfare (which they considered as something different from animal health). In Italy, 76 per cent of interviewed farmers disagreed with the proposition 'The major expert on animal welfare is the veterinarian'. Swedish and British farmers, however, considered the veterinarian as the most important advisor on animal welfare as well as animal health. Norwegian farmers generally described the veterinarian as an important advisor on animal welfare but also complained that they were often too busy, did not dare to express their opinion or had too little knowledge on animal welfare.

20.8 CONCLUSION

As this case study shows, farmers' attitudes towards animals and animal welfare vary across countries, schemes and across sub-sectors.

The national context is important as it defines which rules a farmer has to follow but also because it defines the specific structure of the cattle sector.

The type of quality assurance scheme is important as it provides specific animal welfare regulations.

The sub-sector is important because being engaged in either dairy, beef or veal farming matters for the type of animal, the engagement with the animal and the labour conditions.

There was little difference between farmers across country, quality assurance scheme or sub-sector for what regards the following aspects of farmers' attitudes towards animals and animal welfare:

- opinions about good farming practices;
- reasons for considering animal welfare important;
- assessment of animal welfare;
- knowledge of animal welfare.

All farmers considered taking good care of animals as an essential part of farming. It was seen as a precondition for achieving good results and surviving economically as a farmer. It was also one of the reasons why cattle farmers considered animal welfare important. Cattle farmers measured animal welfare in two different ways: first, by assessing animal-based characteristics, such as behaviour, appearance, performance and health; second, by evaluating the living conditions for the animals and the care farmers provided for their animals.

In general, cattle farmers felt confident about their knowledge of animal welfare and felt no need for extra information. Most of them used the following knowledge sources: their own professional experience, contacts with colleagues, professional magazines and external advisors from feeding companies, slaughterhouses, veterinarian or other advisory agencies.

How farmers perceived the role of the veterinarian for animal welfare and the necessity to improve animal welfare on the farm differed per country. Italian and Dutch farmers considered the veterinarian as a good source of knowledge on animal health but not animal welfare, whereas Norwegian, Swedish and British farmers regarded the veterinarian as the most important advisor on animal welfare.

Most farmers across countries were of the opinion that their animals fared well although some improvement could always be made, such as the ventilation of stables, more space for the cows, altering tethering systems to free-range stable systems, and providing softer walking and lying surfaces for the cows. Only few farmers were actually planning to make these improvements on their farm.

The study also shows that scheme participation matters for farmers' definitions of animal welfare. Farmers participating in specific animal welfare or organic schemes defined animal welfare in terms of natural behaviour, whereas the other farmers referred mainly to animal health, good care, good living conditions and absence of stress. In the Netherlands, scheme participation had little effect.

There is also a clear difference between farmers active in the various sub-sectors of cattle farming. It mattered whether a farmer was engaged in dairy, beef or veal farming for their relationship with animals as well as for their definition of animal welfare. This may be explained in part by the different working conditions in each of these sectors. The necessity to perform tasks in close proximity of the animals, such as milking, or the necessity to keep a healthy distance towards the animals, as is the case with bull farmers, affects the relationship between farmer and animals. In addition, it makes a difference whether or not farmers breed their own animals. Important is also how many animal are present and the period of time that the animal is actually present on the farm.

Farmers from different production types differed in their definition of animal welfare. Beef farmers, and especially suckling-cow farmers, considered natural behaviour as an important condition for animal welfare. Veal farmers, on the other hand, did not refer to behavioural conditions at all or tended to look more at living conditions and animal health when describing animal welfare.

21

FARMERS' PERCEPTIONS OF ANIMAL WELFARE LEGISLATION

This chapter reports on farmers' perceptions of animal welfare legislation, their readiness to accept additional measures but also their knowledge of national and European legislation.

21.1 KNOWLEDGE OF ANIMAL WELFARE LEGISLATION

In general, farmers felt rather comfortable about their knowledge of national animal welfare legislation but less secure about EU directives. In Italy, France and the Netherlands, veal farmers were most knowledgeable of national animal welfare rules legislation compared to other cattle farmers. This is hardly surprising, when taking into account that veal farmers were recently confronted with specific animal welfare legislation for calves under the age of six months, which impacted heavily on the practice in their sector and required considerable investments to alter their housing system.

As there is hardly any specific animal welfare legislation for the other cattle sub-sectors, it was difficult to assess the knowledge of dairy and beef farmers. Most of these farmers thought that their knowledge was sufficient even though they did not know the legislation in detail. They were confident, however, that they would be able to find the specific legislation in case they needed to. Dutch farmers participating in specific animal welfare or organic schemes felt less secure about their knowledge of legislation compared to farmers in basic or top quality assurance schemes. However, they expected that participation in the specific scheme would guarantee their compliance with legislation.

Most farmers derived their knowledge about animal welfare legislation from agricultural magazines, governmental information, farmers' organizations, controlling agencies, agricultural advisors and the Internet.

21.2 EVALUATION OF NATIONAL AND EUROPEAN REGULATIONS

Most of the farmers in Italy, the Netherlands, Sweden and the United Kingdom were satisfied with the legislation for animal welfare. Some Dutch organic farmers considered the legislation as too lenient. Norwegian farmers were satisfied with the current legislation but worried about the changes in the near future. French farmers were divided; about 45 per cent of the farmers was content with the legislation; others considered the legislation as either too strict or too lenient.

When they considered legislation as too strict, farmers generally worried about the following: higher production costs, higher labour demands, unpractical measures and too much focus on centimetres instead of on animal well-being. In Norway, tie-up stalls will be forbidden in 2024, forcing farmers to build free-range stables. Some Norwegian farmers feared that the magnitude of this investment will force small-scale farmers to end their farms. This would then lead to further scale enlargement, which they considered a bad development and detrimental to animal welfare, because it could lead to less attention for the individual animal.

Farmers who considered the current legislation as too lenient generally thought that there should be more attention to surface space, comfort increasing measures, and for healthy feed without GMOs.

Dutch, Norwegian, Swedish and British farmers were generally convinced that animal welfare legislation in their own country was stricter than animal welfare legislation of the EU or in other EU countries. About a quarter of French farmers thought the same. In Italy, 50 per cent of farmers thought that legislation in other countries was the same as Italian legislation. The fact that farmers were more familiar with their national animal welfare legislation than with EU regulations for animal welfare, or regulations in other EU member states could explain farmers' beliefs that the legislation in their own country is best.

21.3 ATTITUDE TOWARDS ADDITIONAL MEASURES

Ban on Tethering Cows

A high proportion of French dairy and suckling farmers especially in mountainous areas still use tie-up stalls. The opinion of French farmers about this type of housing proved to be divided according to the geographic location of the farmers and the size of their farms. Farmers in the mountains consider tie-up stalls as better adapted to their system of production. In their opinion, a loose housing system might look more comfortable for the animals but, in their view, an important disadvantage was the difficulty to monitor the animals and to keep them clean because of limited straw supply in these locations. Some farmers with less than 30 cows did not see any inconvenience with the tie-up system as long as farmers were attentive to and careful with the animals. The physical proximity between farmer and animal would make the animals more docile, which facilitated interventions on sick animals or for difficult calving. Other French farmers thought that the animals were better off in loose housing.

Norwegian farmers will have to adapt their housing system, since the tie-up system will be banned in 2024, and building or rebuilding tie-up systems is already prohibited. At the moment, 14 per cent of the farms in Norway already have a loose-housing system; the other farmers will have to convert their system.

A large group of French, Norwegian and Swedish farmers considered it better for animal welfare to use a loose-housing system instead of a tie-up system. Yet, some farmers in France with specific production conditions did not see benefits in banning the tethering of cows and some Norwegian farmers were concerned that this legislation will force small producers out of business and lead to scale-enlargement. In Italy, the Netherlands and the United Kingdom, only few farmers supported a ban on tethering cows. Although in the Dutch sample there was only one farmer with a tie-up system, most Dutch farmers disagreed with a ban on tethering cows. They thought that it did not matter much for the animal's welfare whether it is kept in a loose-housing system or a tie-up system; both systems had advantages and disadvantages for animal welfare in their view. In loose-housing systems animals had the freedom to move around, in tie-up systems there was less stress due to hierarchy fights and there were fewer problems with the claws of the cows.

Mandatory Outdoor Access

In Norway and Sweden, it is mandatory to provide outdoor access for cattle. Most farmers in these countries agreed that this was a good measure for animal welfare. The Norwegian research team asked farmers what they thought of outdoor access for the whole year. Although many Norwegian farmers could see that it would improve the welfare of their animals, most thought that it would not be feasible due to climatic problems and the increasing workload, especially for farmers with tie-up systems. French and British farmers considered it self-evident that cows should be outside during summer.

In the Netherlands, more and more farmers keep their animals inside all year round because it is a more efficient way of producing and facilitates compliance with Dutch environmental legislation. The majority of Dutch farmers thought that grazing is better for animal welfare than indoor production, but feared that in future they would be forced to keep their animals inside. Six farmers did not think grazing was better; in their opinion, animal welfare would not have to suffer necessarily with the right in-door housing conditions. Dutch veal farmers were also asked how they thought about (partial) outdoor housing. About one third of the veal farmers agreed that it would be an improvement for the welfare of the animals. Others thought that outdoor access would induce welfare problems such as aggression to establish hierarchy and problems with the land, since the group size would be too large. For veal farmers, it would not be feasible to provide outdoor access to veal calves.

In Norway, farmers were asked how they felt about offering outdoor access to bulls. The majority of farmers thought it would be too dangerous to let the bulls go outdoors, although it might be good for the animal.

Providing Soft Surface

In Norway, it has become mandatory since 1 January 2006 to provide a soft surface for cows and heifers within less than 2 months from calving. Most Norwegian farmers supported this measure and provided soft surface. A few farmers were negative about soft mats for the cows because they had problems with moist and cleaning and worried about the health of the claws.

French, Dutch, Swedish and British beef and dairy farmers thought that there should be some sort of bedding material and that it would not to be beneficial to keep cattle on bare concrete.

Dutch veal farmers were also asked how they thought of providing soft bedding to their veal calves. About one third thought that the calves would like soft bedding and thought that soft bedding in the form of rubber on the slatted floors might work. The other farmers did not think it would matter for the welfare of veal calves or thought that animal welfare would even deteriorate because straw bedding could become wet and cold and it could negatively affect the health of the calves. Some veal farmers used a pipeline system to take away the slurry manure to a processing plant, this would not be possible when using a straw bedding system.

Comfort Measures

Across the six countries farmers thought similar about installing cow brushes. Some farmers had already installed cow brushes. In general, farmers agreed that it would improve animal welfare as cows liked to be brushed, but it was not seen as an essential factor for animal welfare. In Norway and Sweden, farmers mentioned that cow brushes could only be installed in loose-housing systems, so for some farmers this measure was not applicable.

Regular Hoof Care

Farmers generally considered hoof care important, but if hoof trimming was necessary or not depended on the animal and its housing conditions. Farmers supported the idea of regular attention to hoof care but opposed a measure prescribing regular hoof trimming. In their opinion, it should be left to the judgement of the farmer to decide whether or not an animal needed hoof trimming.

Separation of Mother and Calf

This issue was only discussed with Norwegian farmers. In milk production, mother and calf are usually separated shortly after birth. Organic producers are required to keep mother and calf together for three days. Norwegian farmers were asked what they thought of this requirement. Nearly half of the farmers sympathized with the idea and saw some positive aspects of the measure. But most Norwegian farmers saw also difficulties in implementing this measure. They felt that it was crueler to let the mother attach to her calf and then separate the two instead of separating them before attachment. They also feared that it would increase the workload and limit the interaction between farmer and calf in its first days. Finally, it was considered dangerous for the farmer to handle mother and calf.[50]

21.4 CONCLUSION

How cattle farmers perceived current legislation or future or fictive animal welfare measures proved to differ across countries and sub-sectors. As far as current legislation for animal welfare is concerned, veal farmers proved to be more knowledgeable compared to other cattle farmers, mainly because they were recently confronted with an upgrading of EU regulations for animal welfare for calves. Dairy and beef farmers felt less secure about their legal knowledge, but still considered it sufficient. Farmers participating in specific animal welfare and organic schemes felt insecure about their knowledge but assumed that compliance with scheme specifications made them automatically comply with animal welfare legislation as well. Cattle farmers felt most insecure about their knowledge of EU regulations. Notable is also that more than half of the cattle farmers in Italy, the Netherlands, Sweden and the United Kingdom were convinced that animal welfare legislation in their own country was strictest of the whole of the EU. In France 25 per cent of the farmers shared this belief.

[50] Swedish organic farmers have to let calves suckle for at least the full colostrums period. The farmers consider it cruel to separate cow and calf after some days instead of separating them before attachment has been build. For KRAV the main reason for not separating cow and calf is the considerable strengthening of the calf's immune defence system.

French, Norwegian and Swedish cattle farmers were most positive about the benefits of a ban on tethering cows for animal welfare. Other farmers did not think that a ban would matter much for the welfare of cows. In their views, both systems had advantages and disadvantages for animal welfare.

Mandatory grazing was seen as beneficial for cows by cattle farmers from France, Norway, Sweden and the United Kingdom. Most Dutch farmers agreed, but about 20 per cent of the dairy farmers thought that with the right housing conditions animal welfare did not need to suffer from indoor production systems. Many Dutch farmers feared to be forced to produce indoors in the future due to strict environmental legislation.

None of the farmers opposed the introduction of soft lying areas, cow brushes or hoof care. Many farmers perceived the first measure an essential condition for cows; cows needed to lie down to ruminate in their view and to gain high milk production, ruminating was seen as essential. Cow brushes were not seen as an essential measure, but installing them required little effort so most farmers had no objection against this measure. Most cattle farmers agreed that good hoof care was essential for cows. But many farmers considered it unnecessary to prescribe regular hoof care by legislation; in their view this should be left to the judgement of farmers.

22

ANIMAL WELFARE OFF THE FARM

This chapter describes how farmers thought about the level of animal welfare off the farm and during transport and at the slaughterhouse.

22.1 ANIMAL WELFARE DURING TRANSPORT

In general, farmers across the six countries were satisfied with animal transport although some felt that they actually lacked knowledge about transport practice. Most farmers agreed that the following factors were crucial for animal welfare during transport: time and length of the journey, stocking density in the truck, adequate water, feed and rest during long transports, good ventilation and hygiene, good loading conditions, and well-qualified staff with good animal handling. According to most farmers, transportation of live animals had considerably improved over the last decade. Most farmers considered the disappearance of local slaughterhouses as detrimental to animal welfare as it increased transport distance. Farmers were in favour of more local slaughterhouses; Norwegian and Swedish farmers also suggested the use of mobile slaughterhouses to prevent long travelling distances for animals.

Dairy farmers were less knowledgeable of animal transport than beef and veal farmers.

Beef farmers mentioned that transport was very important to them, since stress in the animal could deteriorate meat quality. This would result in price reduction. Most beef farmers either transported the animals themselves or were very careful in selecting a good transport company. Dutch veal farmers, who often received young calves from abroad, were generally very satisfied with the condition of the animals they received after long-distance transport. In order to improve long-distance transport, they suggested to set shorter working hours for the driver; in their experience the driver was often more tired than the veal calves, and impatient when handling the animals.

22.2 ANIMAL WELFARE AT THE SLAUGHTERHOUSE

Most of the cattle farmers were not familiar with the conditions in a slaughterhouse. They assumed animal welfare to be good as slaughterhouses would obey legislation on this subject and regularly checked. They also expected it to be in the best interest of slaughterhouses to treat animals well as stress would negatively influence meat quality. Those farmers who were not aware about the conditions in a slaughterhouse, generally expected that the welfare of animals would sufficiently be taken care of. Some farmers were critical, mainly because they believed that the slaughterhouse personnel were rough with the animals.

Farmers considered the waiting area and waiting time to be most crucial for the welfare of the animals. Waiting time should be sufficiently long to provide rest for the animals to recover from transport, but not so long that the animals would get stressed. Furthermore, overcrowding of animals should be avoided, and animals should stay with the group of animals they arrived with at the slaughterhouse. The waiting area should be clean, suitable for animals, and there should be a safe path from the waiting area to the slaughter line. The animals should be handled with care and respect and the final stunning and killing should be as humane, swift and painless as possible.

22.3 CONCLUSION

Farmers across countries and schemes were generally satisfied with animal transport. Beef and veal farmers were more knowledgeable on this topic than cattle farmers. Beef farmers often transported their own animals to the slaughterhouse to reduce stress levels in their animals; veal farmers were familiar with receiving transports with young veal calves from abroad. Farmers worried about the reducing number of local slaughterhouses and the resulting increase in transport distances.

Most cattle farmers were not familiar with the conditions in a slaughterhouse, but assumed that animal welfare would be ensured. There was sufficient legislation and control in this area. Moreover, it was considered to be in the best interest of slaughterhouses to treat animal well in order to avoid loss in meat quality.

23

MARKET AND SOCIETY

This chapter deals with farmers' expectations regarding consumers, retailers and the government concerning improvement of animal welfare and, more specifically, with their expectations regarding the possibility to market animal-friendly products.

23.1 FARMERS' PERCEPTIONS OF SOCIETY

Public Image of the Cattle Sector

About half of the Italian, Dutch and Swedish cattle farmers were convinced that the public image of the cattle sector was good. About 20–25 per cent of farmers believed that the general public was indifferent towards the cattle sector and that people had very little knowledge of the cattle sector. The other farmers were either unsure about the image of the sector or expected the image to be negative. They worried that bad publicity about intensive husbandry sectors affected how the public thought about cattle farming. Veal farmers believed that many people still thought of veal crates when thinking of veal farming, even though the veal sector had changed towards group housing. Norwegian and French cattle farmers were more positive about their sector's image. Most Norwegian farmers expected their image to be positive although they were concerned about the distance between consumer and farmers. In France, nearly all cattle farmers expected their image to be good.

Farmers' Perceptions of Consumers

In most countries, farmers had an ambivalent opinion about consumer concerns for animal welfare. They believed that consumers considered animal welfare as generally important and desirable but, at the same time, they would let other aspects, such as cheap price and meat quality prevail in their consumption behaviour. Many farmers also thought that consumers did not have sufficient knowledge of cattle farming practices to allow them to make specific demands for animal welfare. They also thought that many consumers were misinformed by bad publicity. Farmers did not believe that the latter group of consumers was actually prepared to pay more for animal-friendly products. Farmers felt that they fulfilled the general demands for animal welfare of consumers, although they recognized that there was a small group of consumers with additional demands for animal welfare. According to some farmers these extra demands were not always realistic.

Farmers considered consumers a powerful group and consumers' choices a powerful instrument to support animal-friendly production. But in order to realize their influence, consumers needed to make a specific choice for animal-friendly products and should be prepared to pay the price. Consumers should also be more aware of the labels for animal-friendly production. Swedish and British farmers thought that consumers could support animal-friendly production by buying domestic instead of imported products.

French, Italian and British farmers strongly believed that better education and more information for the general public about current farming practices and animal welfare standards were essential for improving the relationship between farmers and the general public. This should be a mutual effort of the government (by financing publicity campaigns), retailers (by informing consumers in stores) and farmers (by being more open to the public and actively organize farm visits and open days on the farm).

Farmers' Perceptions of Animal Welfare Campaigners

Across the six countries, farmers thought also ambivalently about animal welfare campaigners. Activist actions such as releasing mink were met with disapproval of farmers. Also television campaigns with 'extreme' images of animal production were seen as manipulative, even though dairy and beef farmers were generally not the subject of such actions. In the opinion of farmers, these 'activists' crossed the line, spread false information and used illegal methods. Farmers believed that these organizations had lost their credibility among the general public. On the other hand, there were animal welfare campaigners who entered into discussions with the sector about their demands and who tried to change things within the democratic system. Farmers appreciated these organizations, even thought they did not always agree with their demands. Farmers recognized that these organizations served as guard dogs and set the agenda for change in the sector. They also believed that these organizations had the support from the general public. A remarkable outcome was that not all farmers in Italy were aware of the existence of animal welfare campaigners. Perhaps such organizations have not been as active in Italy as in other countries.

Farmers felt that animal welfare organizations could serve animal-friendly production best by deliberating with the sector and helping with the establishment of new markets for animal-friendly products and their promotion.

Farmers' Perceptions of Government

In general farmers believed that government could support animal-friendly production by:

- informing and educating consumers about farming practices and about animal-friendly production;
- funding research about animal welfare;
- assuring that European farmers complied with equal animal welfare standards and preventing the imports of cheap foreign products that did not meet these standards.

Farmers were divided about the question whether animal-friendly production should be encouraged through subsidies. In Italy, France and Norway, some producers answered spontaneously that subsidies would help in the development of animal-friendly production. In Sweden, only two farmers mentioned this. In the UK, farmers did not mention subsidization as an option for governmental support of animal-friendly production. Some of the Dutch farmers considered financial support for animal welfare a good idea, although others were very clear about not wanting to depend on subsidies.

23.2 FARMERS' PERCEPTIONS OF THE MARKET

Farmer's Belief in Animal-friendly Labelling

The majority of Italian farmers (80 per cent) were confident about selling products with an animal-friendly production label. Farmers in other countries were much more sceptical.

The majority of French, Swedish, Dutch and British farmers did not believe in the market potential of products with animal-friendly labels. The same was true for about half of the Norwegian farmers. Reasons for this distrust were the following.

- Animal welfare alone is no guarantee for better product quality, such as better taste or visual aspects.
- Animal welfare is not a priority for consumers; the deciding factor will be the price with which a product can be put on the market.
- Animal welfare is already an integral part of good farm management. Or: Animal welfare is already good enough, so there is little room for distinction in the market.
- Consumers who want extra animal welfare can already buy organic products.
- Dairy factories will be hesitant to let two brands of their own milk compete with each other.
- There are already too many labels, which makes it difficult for consumers to get a clear picture of animal welfare as part of the product's quality.

Those farmers who believed in the possibilities of animal-friendly production gave the following reasons:

- animal-friendly production is a way to distinct themselves from industrial production methods;
- animal-friendly production can only succeed with good publicity campaigns;
- animal-friendly production would only sell within a small niche market.

Dutch veal farmers argued that their products were sold on foreign markets where animal welfare was no priority of consumers.

Farmers' Perceptions of Retailers

Italian farmers did not believe that retailers could play an important role in supporting animal welfare. According to them, only consumers could be a driving force for improving animal welfare. About half of the Swedish farmers were critical and sceptical about a possible role of retailers as they mistrusted retailers' real interests in animal welfare. Farmers in other countries thought that retailers could play a major role in the development of animal-friendly production, but they too doubted whether retailers were really concerned with animal welfare. They were afraid that retailers used animal-friendly production mainly for safeguarding their own good image with the general public and to make profit. In France, Italy and the United Kingdom, farmers were asked about their relationships with retailers. Many of them considered it difficult to relate with retailers, whom they perceived as far more powerful compared to farmers. Individually, they lacked power and skills in order to negotiate successfully with retailers and market parties. In their view, it was up to organizations to protect farmers' interests vis-à-vis the market.

In the opinion of farmers, retailers could support animal-friendly production by:

- paying a fair price to farmers who supplied animal-friendly products;
- informing and educating consumers about animal-friendly production;
- stopping to buy and import cheaper products that were not produced according to national animal welfare standards;
- stopping to use meat as a discount product.

23.3 CONCLUSION

There was no difference between cattle farmers across production sectors or quality assurance schemes in terms of their perception of market and society. On some points, farmers across countries differed in their opinion. Notable was especially the optimism of Italian cattle farmers regarding the chances of animal-friendly labelling.

Farmers generally agreed in their perception of consumers, animal welfare campaigners and government. Cattle farmers believed that consumers wanted animal-friendly products, but were generally not willing to pay extra money for these products, with the exception of a group of consumers. Although cattle farmers did not feel attacked generally by animal welfare activists, they did not agree with the action methods. But compared to the pig farmers, cattle farmers felt less pressured by animal welfare campaigners and the government.

Across countries, cattle farmers differed in their opinion of retailers and market possibilities for animal-friendly production. About 80 per cent of Italian farmers were positive that properly labelled, animal-friendly products could sell. But farmers from France, the Netherlands, Norway and the UK were less optimistic. In their view, animal welfare was not really an issue in their production sector. Therefore, there was too little difference between regular products and animal-friendly products to convince consumers. The positive perception of the Italian farmers on the possibilities of animal welfare labels in the market is notable also because participation in animal welfare schemes is especially low in Italy, and most Italian farmers have little experience with working in such a scheme. Given the high levels of trust in the marketability of animal-friendly products, one might expect more Italian farmers to enter animal welfare schemes. In the other countries, more farmers participated in animal welfare schemes; at the same time, these farmers were more sceptical about the possibilities of animal welfare labels in the market compared to Italian farmers, maybe because of disappointment with the results of the schemes.

There is also a clear difference in the expectation farmers across countries have of the role of retailers in the development of animal-friendly products. Italian cattle farmers expressed little belief in retailers supporting the development of animal-friendly production, while the cattle farmers in other countries believed that retailers could play a major role. They doubted, however, that retailers were indeed ready to play this role.

24

CONCLUSIONS TO PART III

This chapter summarizes the most important findings of this case study and concludes to what extent participation in schemes matters for farmers' attitudes, beliefs and behaviour regarding animal welfare. It also draws conclusions about the importance of differences between countries and the sub-sectors within cattle farming.

24.1 DIFFERENCES IN FARMERS' ATTITUDES, BELIEFS AND BEHAVIOUR ACROSS SCHEMES

Farmers differed in their motivation for entering quality assurance schemes. They explained their decisions for entering basic or top quality assurance schemes by referring to improved market opportunities (access, premium prices) or by referring to society's demand for more transparency, traceability and quality checks. Farmers who participated in specific animal welfare or organic scheme motivated their choice by ethical concerns especially about environmental degradation but also animal welfare. But many of them referred also to improved market opportunities.

Farmers appointed various obstructions for entering a scheme with stringent animal welfare regulations. It is notable that animal welfare measures as such were seldom mentioned as important constraint. Worries about the economic viability of these schemes were more prominent as were difficulties to comply with other restrictions of especially the organic scheme regarding the use of medicines, fertilizers and eradicants. Sometimes the fact that a scheme was hosted by a specific chain actor played an important constraining role, when farmers would need to switch from one buyer to another. This can be nearly impossible, for instance, when a change of dairy cooperative is concerned. Generally, cattle farmers thought that participation in quality assurance schemes was important. Quality assurance schemes increased the transparency of farming, which was, in their view, the key to market access.

Farmers who participated in basic or top quality assurance scheme differed in their perception of animal welfare from farmers who participated in specific animal welfare or organic schemes. But the differences between cattle farmers were much smaller than among pig farmers. Cattle farmers differed in their definition of animal welfare but hardly in their ideas of good farming, their relationship with animals or in their assessment of animal welfare.

All cattle farmers considered good care taking of animals as an essential part of farming and characteristics of a ‘good farmer’. Taking good care of animals ensured animal welfare, which allowed for good performance of animals and ultimately defined farm income.

There is little difference in specific animal welfare regulations between organic and conventional production schemes in dairy and beef farming. In both cases, dairy and beef farming is rather extensive. Animal welfare was seldom the most important reason for cattle farmers when converting to organic agriculture, as was the case among pig farmers in a previous case study. Most of the cattle farmers explained their decision to produce organically by referring to the environmental impact and food safety. Maybe this explains why cattle farmers differed less in their attitudes towards animal welfare compared to pig farmers.

However, there was a difference among cattle farmers in their definition of animal welfare. Like in the pig study, farmers participating in basic and quality assurance schemes defined animal welfare in a different way than farmers in specific animal welfare and organic schemes. Cattle farmers in basic and top quality assurance schemes described animal welfare primarily in terms of animal health, living conditions for the animals and as the absence of stress. Farmers who worked in a specific animal welfare or organic scheme defined animal welfare as the possibility for expressing natural behaviour. For organic farmers this can be explained within the context of the holistic organic philosophy. Generally, cattle farmers did not perceive their way of production to be problematic for animal welfare, nor was it perceived as such by the general public or government. In the opinion of farmers, there was also little difference in the level of animal welfare between conventional practices and organic practices.

The two groups of cattle farmers differed hardly with regard to their perception of animal welfare legislation or their readiness to accept new animal welfare measures. Generally speaking, all farmers were ready to accept all measures proposed in this research. Scheme participation has also little effect on farmers’ opinions about transport, slaughter, market and society. There was hardly any difference on this point between cattle farmers from basic and top quality assurance schemes and farmers from specific animal welfare and organic schemes.

24.2 DIFFERENCES IN FARMERS' ATTITUDES, BELIEFS AND BEHAVIOUR ACROSS PRODUCTION TYPES

In order to understand the difference in farmers' attitudes, beliefs and behaviour towards animal welfare, differences between cattle sub-sectors were more important than differences between production schemes. It clearly mattered whether farmers were engaged in dairy, beef or veal farming in terms of how they thought and acted when it comes to the welfare of farm animals. This has to do with differences in farming practices, in farmers' contacts and relations with animals, but also with different experiences with public concern about animal welfare.

Veal farmers have been confronted with public concerns about animal welfare for many years, and the sector has been subject for numerous animal welfare campaigns. Also, numerous alterations of animal welfare legislation have taken place, certainly compared with the other cattle sectors. Veal farmers participating in this research thought that they had invested enough for the time being and were not ready to accept any more and new animal welfare measures. In their view, they made considerable changes in their way of production in order to meet the concerns for animal welfare. Beef and dairy farmers felt that there were no serious animal welfare problems in their sub-sector. They felt also little pressure from public concern, government and animal welfare campaigners to change their ways of production. Compared to veal farmers and the pig farmers of the previous study, beef and dairy farmers did not have very elaborated ideas and opinions about animal welfare.

The most importance difference between veal, beef and dairy farmers concerned their perception of animals and their relations with them, however. Being engaged in veal, beef or dairy farming makes a difference for the way farmers deal with animals, the tasks they have to perform with animals; this again determines how much and how close the contact between farmer and animal is. Dairy farmers engage closely with their cows during milking every day, while bull fattening farmers keep at distance out of safety reasons. Veal farmers generally engage with groups of animals – for instance, during feeding – and have little contact with individual animals. The type of production determines also how many animals a farmers cares for and how long an animal is in the possession of the farmer and actually present at the farm. Dairy cows, for instance, stay on the same farm for several years whereas a veal calf is sold within weeks. For contacts with dairy and suckling cows, it is also important that farmers breed their own animals, sometimes using bloodlines that have been started by the farmer's family.

Each sector also has its own typical housing conditions that influence farmers' considerations of what is important for animal welfare. Suckling cow farmers generally kept their animals outdoors, on pasture or nature conservation grounds; the possibility for expressing natural behaviour was an important precondition for the welfare of animals in their view. The same generally applies for dairy farmers. It is notable, however, that those

Dutch dairy farmers who anticipated indoor producing in the future tended to highlight the potentially positive effect of indoor production for animal welfare. Veal farmers, who produce very intensively and indoors, did not refer to behavioural aspects at all, but did focus on animal health.

Beef, dairy and veal farmers differed also in their perception of proposed future animal welfare measures and their readiness to accept them. Veal and bull fattening farmers worried about measures such as mandatory outdoor access, because it was hard to implement in their sector and more difficult than for dairy or suckling cow farmers. Bull fattening farmers considered it dangerous to let a two-year old bull out in a pasture. For veal farmers, who worked with a high number of animals, the availability of land to implement this measure presented a serious problem.

Differences in farming practices and experience mattered also for farmers' opinions about animal welfare during transport and at slaughter. Dairy farmers had little experience with animal transport and slaughter. In most cases, dairy farmers sold their calves and their culled cows to a trader who looked after the transport of the animals. Veal farmers, on the other hand, were accustomed to receive transports with young calves, sometimes from long distances, and beef farmers sometimes transported their own animals to be sure that the endeavour was as stress free as possible and to avoid losing meat quality due to careless transport. Meat producing farmers were also more aware of the conditions at slaughterhouses, although not many farmers had actually visited a slaughterhouse.

24.3 DIFFERENCES IN FARMERS' ATTITUDES, BELIEFS AND BEHAVIOUR ACROSS COUNTRIES

The context of cattle farming is quite similar across the six countries. France has the highest numbers of cattle farmers and cattle, followed by Italy and the United Kingdom. Norway has the lowest numbers of cattle farmers and cattle, followed by Sweden and the Netherlands. In all countries, there is an ongoing trend of concentration and scale enlargement. Norway and the UK have the highest increase in number of animals per farm over the past five years. Farmers in both countries worry that scale enlargement affects the care farmers can provide to individual animals. For Norwegian farmers, this is also linked with the future ban on tie-up sheds in 2024; they fear that the need to invest in loose-housing systems will accelerate scale enlargement and will force many small-scale farmers to quit farming.

In dairy production, competition between the six countries is limited due to the milk quota system; with regard to processed milk, competition is very difficult to evaluate as the enormous difference in products makes it difficult to draw a general conclusion. France is the only country that exports beef, the other countries have to import beef to fulfill consumer demand or are nearly self-sufficient. Veal production exists only in France, Italy and the Netherlands. The Netherlands is a large producer of veal, most of which is exported as veal consumption in the Netherlands is low.

There is no specific animal welfare legislation in EU level for dairy and beef production, but there is specific legislation for calves. Norway, Sweden and the United Kingdom have national regulations for the animal welfare of dairy and beef cattle that is above the level of the general EU regulation. France, Italy and the Netherlands follow EU regulations for dairy and beef. With regard to the production of veal (calves under six months), national animal welfare regulations of Sweden, Norway, Italy, the Netherlands and the United Kingdom is stricter than the EU regulations; France follows EU regulations. Compared to the pig study, cattle farmers complained less about unfair competition due to different national levels of animal welfare legislation. In some countries, this can be explained by the fact that there is no specific animal welfare legislation for dairy and beef cattle and little difference in the regulation of the veal sector in this respect. In Sweden, UK and Norway, the relatively low level of importance of this sector is probably a reason for less concern about competition.

There is also little difference between the six countries in the development of quality assurance schemes. The Norwegian cattle sector has only a basic quality assurance scheme and an organic scheme. In the other countries, three different types of quality assurance schemes are operational (mostly basic quality top quality and organic; see Table 17.2). Only the United Kingdom and the Netherlands have specific animal welfare schemes. Whereas it is still rare for Italian farmers to participate in a quality assurance scheme, farmers from France, the Netherlands, Norway, Sweden and the UK experience high market pressure to produce within quality assurance schemes. Most of their buyers either refuse to buy products from farmers who do not participate in a quality assurance scheme or impose severe price cuts.

There was little difference between countries in terms of farmers' attitudes towards animal welfare, animal welfare legislation, animal welfare during transport and slaughter, or belief in animal-friendly products. It was notable, however, that Italian farmers were the most optimistic about the possibilities of animal welfare labels in the market compared to other farmers, although they had little actual experience with working in animal welfare schemes. Maybe farmers with more experience with animal welfare labels were disillusioned or disappointed. Many of the farmers in these countries believed it was not possible to sell animal-friendly labelled products for a price premium or only on a very small niche market.

24.4 GENERAL CONCLUSIONS

With the exception of veal farmers, the cattle farmers in this study did not feel under pressure by animal welfare legislation or by the public perception of animal welfare in their sector. Most of them were also of the opinion that there are no serious welfare problems in their sector; most of the veal farmers thought that earlier welfare problems were now solved by the latest EU regulations for the animal welfare of calves. Primarilly, it was not for animal welfare reasons that cattle farmers decided to enter quality assurance schemes and to change their production methods. When farmers decided to convert to organic agriculture, they were not motivated generally by their worry about animal welfare. Farmers participating in different quality assurance schemes differed also little in their ideas about animal welfare. Farmers generally agreed that proposed animal welfare measures were indeed beneficial for the welfare of cattle. Only a ban on tethering was questioned in half of the countries, not because farmers disagreed with the alternative of loose housing, but because they felt that loose housing was not necessarily the best option in terms of welfare, as both systems had their own advantages and disadvantages for animal welfare.

Cattle farmers believed that consumers wanted animal-friendly products, but doubted that the average consumer would be willing to pay extra money for these products. In all countries, except for Italy, farmers thought that retailers could play an important role in the development of animal-friendly production; they were sceptical, however, about retailers' willingness to play that role. In this, cattle farmers resembled the pig farmers from the previous case study. In line with this, many cattle farmers in France, the Netherlands, Norway and the UK did not believe in the success of animal-friendly products. They were actually more pessimistic about the chances of animal-friendly production than pig farmers.

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APPENDICES

1 TENDER SPECIFICATION: SURVEY 'WELFARE QUALITY'

1 Introduction

Cardiff University, in collaboration with research teams in six other European countries in the project Welfare Quality®, intends to run a population survey regarding attitudes to farm animal welfare in seven European countries. The project <http://www.welfarequality.net) is funded by the European Commission under the 6th Framework Programme for research and development (contract no. FOOD-CT-2004-506508). The overall project is coordinated by the Animal Sciences Group of Wageningen University and Research Centre, Lelystad, the Netherlands. The survey task is coordinated by Cardiff University, UK, and the National Institute for Consumer Research (SIFO) in Oslo, Norway.

The plan is to contract one poll institute who will then coordinate the practical implementation of the survey, through its respective affiliates in participating countries.

The tender process is organized by an ad hoc committee set up by the Project Management Committee. The ad hoc committee includes the project coordinator, Harry Blokhuis, and the task coordinators, Mara Miele from Cardiff University and Unni Kjaernes from the National Institute for Consumer Research. Their decision on granting a tender will be made by 1 July.

Regarding the criteria for selecting the best offer, it is emphasized that all requirements in this Specification should be met, specifically:

- demonstrate appropriate previous experience with CATI surveys;
- demonstrate appropriate previous experience with cross-country population surveys (examples required);
- demonstrate appropriate previous experience with contracts for social scientific research projects (references, contact persons required);
- demonstrate established collaboration, including management and communication procedures with affiliate polling institutes in the selected countries (examples required);
- demonstrate a track record of very high quality and good management in this type of study;
- comply with all the procedural requirements in this Specification;
- all other criteria being satisfactory, price will be decisive.

2 Target Population

Survey target populations should be national populations aged 18–80 years old in the United Kingdom, France, Hungary, Italy, Norway, Sweden and the Netherlands.

3 Method

The investigation must be conducted as an ad hoc CATI (computer-assisted telephone) interview, according to an exact and similar instruction in all participating countries, in order to ensure nationwide comparability of results.

Your procedures for contacts with respondents, including the routine number of recalls, must be explained in your tender.

Pilot interviews testing survey questions and the length of the interview must be carried out in all seven countries. The results from the pilots must be discussed with the task coordinators.

4 Questionnaire/Interview Duration

The questionnaire and interviewer instruction manuals (instructions to interviewers about the general aim of the investigation and specification of concepts) are developed by SIFO in English. The English version needs to be translated into the various countries' local languages by the polling institute in each country, in close contact with the local Welfare Quality® team, to ensure consistency with the data map. Translation also includes standardized background information (demographics). Standardization will be carried out by the Welfare Quality® group, and is submitted by SIFO to the polling institute for distribution to the various participating countries.

The polling institute will, based on the questionnaire, define the data map to be applied in each participating country.

Total interview duration should not exceed 20 minutes in order to avoid respondent fatigue. No open questions are included.

5 Sample Definition

Samples are to be representative for the populations in question, covering the age group 18–80 years old. Costs are required with four different sample sizes:

- 1000 respondents in each country;
- 1500 respondents in each country;
- 2000 respondents in each country;
- 2500 respondents in each country.

6 Reporting

Project reporting must be provided to the National Institute for Consumer Research in Norway in the form of one data file in SPSS format, including all information from the respective participating countries. National files in participating countries must be sent to the coordinating polling institute for final merging. The file must include national identifiers, weights and a brief description of the weighting procedure adopted. A short description of various types of non-response must also be included.

Simple distribution tables for the various variables must also be provided for each national data set.

7 Time Frame

The investigation will be conducted in week 39 (26 September–2 October 2005). It must be carried out simultaneously in all participating countries. Appropriate interviewer capacity must be available in participating countries, and reservations must be made in due time prior to fieldwork.

Pilot interviews are to be undertaken in week 36 (5–11 September).

The task coordinator must receive the project reporting by week 41 (Thursday, 13 October).

8 Costs

The calculation of costs must include the total amount as well as specified costs for each participating country.

Survey costs related to each participating country will be charged via the coordinating polling institute.

9 Participating Agencies

Your tender must include exact information about your affiliates in each country and your connection to them, preferably also information about previous collaborations.

Your tender must also explain communication with your teams and routines that can ensure close coordination throughout the planning and data collection period.

10 Miscellaneous

Before starting the work, an organizational model must be established to define precisely the timing, decision-making and execution responsibilities. This must be done in close collaboration with the project contact, the National Institute for Consumer Research in Norway.

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Cardiff, May 2005,

Mara Miele
Cardiff University
Unni Kjaernes
SIFO

2 FINAL QUESTIONNAIRE

COLOUR CODING: **RED = FOR TRANSLATION**
BLUE = TO BE ADAPTED BY EACH COUNTRY
HIGHLIGHTED YELLOW = CHANGE (SINCE PILOT)

<u>INTERVIEWER INSTRUCTIONS</u> – PUT INTO NATIVE LANGUAGE
<u>CATI INSTRUCTIONS</u> – PROGRAMME, NO NEED TO TRANSLATE
INTERVIEWER NOTES – ADD TO BRIEFING DOCUMENTS AS REQUIRED

<u>ANIMAL WELFARE – MAIN INTERVIEWS</u>

<u>S1</u>
CATI records **REGION** (from sample) and continues if still in quota

INTRO

Good afternoon/evening. I'm ….. calling from TNS, we're the largest market research company in the UK. We are conducting a survey about the food people eat and the way it's produced. We'd like to interview someone in your household about it. Can I just ask you a couple of questions about your household to determine who we should speak to?

IF NECESSARY: ADD …

We're not selling anything. It's a genuine study, which is being conducted across Europe on behalf of a group of universities and academics in Europe (Cardiff University), so that opinions about food and food production can be compared across differ-ent countries. Household telephone numbers have been selected at random so that we interview a representative sample – this is why we'd like to speak to someone from <u>your</u> household.

Continue about your standard MRS code of conduct/quality assurances …

SCREENING

<u>S2</u>
Check you are speaking to someone between 18 and 80 or ask for someone else. If no-one in household between 18 and 80, CLOSE

<u>S3</u>
Ask HOUSEHOLD SIZE
How many people are there in total in your household, including yourself?

WRITE IN	

RANGE = 1-20

<u>S4</u>
And how many of these, including yourself are between 18 and 80?

WRITE IN	

RANGE = 1-20, CANNOT BE MORE THAN NUMBER AT S3

FOLLOW BIRTHDAY RULE PROCEDURES TO CHOOSE SCREENING RESPONDENT OR ANOTHER PERSON 18–80 – TAKE THEIR NAME AND CONTINUE OR CALL BACK FOR THAT CHOSEN PERSON

NOW YOU ARE SPEAKING TO THE SELECTED RESPONDENT AND CAN CONTINUE INTERVIEW …

Can you spare about 15-20 minutes to answer some questions about your household?

IF THIS IS A CALLBACK ASK FOR NAMED (SELECTED PERSON) AND USE INTRO 2:

INTRO

Good afternoon/evening. I'm … calling back from TNS (the largest market research company in the UK). We are conducting a survey about the food people eat and the way it's produced and when we spoke to someone in your household, our computer randomly selected you as being the person in the household we need to speak to. (ADAPT SCRIPT ACCORDING TO BIRTHDAY RULE/RANDOM PROBABLITY SELECTION) MENTION PREVIOUS PERSON YOU SPOKE TO OR DAY OF CALL AS PER CALLBACK INTERVIEWER NOTES WHERE REQUIRED, TO EXPLAIN WHY YOU ARE CALLING BACK OR WHY THEY HAVE BEEN CHOSEN) **If it's OK, we'd like you to answer some questions about the food you eat and how it's produced, which will take around 15–20 mins.**

IF NECESSARY: ADD…

We're not selling anything. It's a genuine study which is being conducted across Europe on behalf of a group of universities and academics in Europe (Cardiff University), so that opinions about food and food production can be compared across differ-ent countries. Household telephone numbers have been selected at random so that we interview a representative sample – this is why we'd like to speak to someone from your household.

Continue about MRS code of conduct/quality assurances …

S5
Record GENDER

Male	
Female	

S6
Ask EXACT AGE

And can you tell me your age please?

WRITE IN	

RANGE = 18-80, if under 18 or over 80, ask for another respondent or CLOSE

MAIN QUESTIONNAIRE

I'd like to start by asking some questions about your eating habits.

ALL RESPONDENTS
Q1
For each one of the food types I am about to read out, I would like to know whether you tend to eat them daily, several times a week, weekly, monthly, less often or never.

Advice to interviewer:

Frequency – If respondent answers twice a month, record this as monthly. If respondent an-swers twice a week, record this as weekly.

Food type – Eggs: this does not mean eggs as an ingredient in something such as an ingredient in a cake. It means as an omelette, boiled egg etc. Milk: means drinking milk, milk in drinks such as tea or coffee or milk on cereal but not as an ingredient in something. Sausages: any kind of sausages

ONE ANSWER FOR EACH FOOD TYPE
DO NOT ROTATE

	READ OUT	Daily	Several times a week	Weekly	Monthly	Less often	Never	(Don't know/Ref) *DO NOT READ OUT*
		1	2	3	4	5	6	9
1.1	Chicken							
1.2	Eggs (not as an ingredient)							
1.3	Bacon and/ or Ham							
1.4	Sausages (any kind)							
1.5	Pork							
1.6	Beef							
1.7	Milk (not as an ingredient)							

ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q1:

IF DAILY, SEVERAL TIMES A WEEK, WEEKLY OR MONTHLY TO ANY MEAT OPTION (CHICKEN, BACON AND/OR HAM, SAUSAGES, PORK, BEEF) AT Q1 GO TO Q3.

IF LESS OFTEN OR NEVER TO ALL MEAT OPTIONS (CHICKEN, BACON AND/OR HAM, SAUSAGES, PORK, BEEF) AT Q1 CONTINUE TO Q2.

FILTERED (IF DON'T EAT MEAT)
Q2
Do you consider yourself to be …

ONE ANSWER

	READ OUT	*EXPLAIN*
1	**Vegan**	**That is, you do not eat eggs or dairy products or any foods of animal origin**
2	**Total vegetarian**	**You eat dairy products but no fish or meat at all**
3	**Partial vegetarian**	**You do not eat meat regularly but you can eat fish or you eat meat very occasionally**
4	**(None of these)** *DO NOT READ OUT*	IF CODED - INTERVIEWER MUST READ: **You eat meat then, but very rarely, or you only eat meat other than chicken, bacon and ham, sausages, pork or beef.** INTERVIEWER TO BACKCODE AT Q1 OR ABOVE IF NECESSARY ('REDO') OR IF OK, LEAVE CODED ('CORRECT')
9	**(Don't know/Ref)** *DO NOT READ OUT*	

ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q2:

IF VEGAN OR TOTAL VEGETARIAN AT Q2 GO TO Q4.

IF PARTIAL VEGETARIAN, NONE OF THESE OR DON'T KNOW AT Q2 CONTINUE TO Q3.

FILTERED (IF EAT MEAT)
Q3
How appealing are each of the following meats on a scale of 1 to 5, where 1 is not at all appealing and 5 is very appealing? You may use any number from 1 to 5.

ONE ANSWER FOR EACH FOOD TYPE
OPTIONS TO BE ROTATED

	READ OUT	**Not at all appealing** →				**Very appealing**	**(Don't know/Ref)** *DO NOT READ OUT*
		1	**2**	**3**	**4**	**5**	**9**
3.1	**Venison**						
3.2	**Veal**						
3.3	**Horse**						
3.4	**Ostrich**						
3.5	**Rabbit**						

ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q3:

IF SINGLE HOUSEHOLD AT SCREENING QUESTION GO TO Q5

IF MORE THAN 1 PERSON IN HOUSEHOLD AT SCREENING QUESTION S3 CONTINUE TO Q4

<u>FILTERED (IF NOT SINGLE HOUSEHOLD)</u>
<u>Q4</u>
How much of your household's food shopping do you do?

ONE ANSWER

<u>READ OUT</u>

1	**All / Almost all**	
2	**More than half**	
3	**About half**	
4	**Less than half**	
5	**Almost nothing / none**	
9	**(Don't know/Ref)** *<u>DO NOT READ OUT</u>*	

<u>ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q4:</u>

IF ALMOST NOTHING/NONE AT Q4 GO TO Q6

IF ALL/ALMOST ALL, MORE THAN HALF, ABOUT HALF OR LESS THAN HALF AT Q4 CONTINUE TO Q5

<u>FILTERED (IF DO SOME FOOD SHOPPING)</u>
<u>Q5</u>
I will now list different types of shops and I would like to know where you usually buy certain food products?

<u>READ THE TYPES OF SHOP AND THEN ASK WHICH TYPE OF SHOP FOR EACH FOOD TYPE. ALLOCATE ONE ANSWER FOR EACH FOOD TYPE TO ONE OF THE RETAIL FORMATS.</u>

The types of shop are:

Large superstore / Supermarket *<u>DO NOT READ OUT</u>* **(e.g. Asda, Sainsbury's, Tesco, Waitrose)**
Small supermarket / Convenience store *<u>DO NOT READ OUT</u>* **(e.g. Spar, Londis, Tesco Metro, Sainsbury's Local, 7-11, corner shops etc)**
Discount store *<u>DO NOT READ OUT</u>* **(e.g. Aldi, Lidl, Kwiksave, cash and carry stores etc)**
Butcher
Other (includes mobile shop, door-to-door/home delivery, farm shop, organic shops, food markets and own production e.g. they have their own chickens)
Or you do not buy the product
(Don't know/Ref) *<u>DO NOT READ OUT</u>*

<u>Advice to Interviewer:</u>
Large Superstores/Supermarkets include hypermarkets and large to medium-sized super-markets selling a variety of goods, mainly food. They are typically located in, or on the edge, of town. Use your own examples to help interviewers (do not read out brands)

Small supermarket / Convenience stores are medium to small-sized general or grocery stores, selling mainly food. They are often chains or can be independents. An example of a small supermarket is Tesco Metro and convenience store is Spar or the traditional corner shop. Use your own examples to help interviewers (do not read out brands)

Discount stores are supermarkets with a low price profile e.g. Aldi, Lidl or 'cash and carry' stores.

Others encompass every other format where food can be bought, including farms and mar-kets and own production. When referring to delivery, this does not mean delivery by a su-permarket.

Don't buy - this does not include if they produce their own – own production is included in Other, it must not be recorded as do not buy the product

Where do you usually buy?

ONE ANSWER FOR EACH FOOD TYPE

	READ OUT	Large superstore/ supermarket	Small supermarket/ convenience store	Discount store	Butcher	Other	Don't buy	Don't know/ Ref
		1	**2**	**3**	**4**	**5**	**6**	**9**
5.1	**Chicken**							
5.2	**Eggs**							
5.3	**Bacon and/or Ham**							
5.4	**Beef**							

ALL RESPONDENTS
Q6
Thinking of farm animal welfare in general, how important is this issue for you on a scale of 1 to 5, where 1 is not at all important and 5 is very important?

Not at all important	→			**Very important**	**(Don't know/Ref)** *DO NOT READ OUT*
1	**2**	**3**	**4**	**5**	**9**

ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q6:

IF ALMOST NOTHING/NONE AT Q4 GO TO Q12

IF ALL/ALMOST ALL, MORE THAN HALF, ABOUT HALF OR LESS THAN HALF AT Q4 AND BUY ANY OF THE MEAT PRODUCTS (Chicken, Bacon and/or Ham, Beef) AT Q5 CONTINUE TO Q7

FILTERED (IF BUY ANY MEAT)
Q7
When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come, on a scale of 1 to 5 where 1 is never and 5 is always?

Never	→			**Always**	**(Don't know/Ref)** *DO NOT READ OUT*
1	**2**	**3**	**4**	**5**	**9**

ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q7:

IF DOES NOT BUY EGGS AT Q5 GO TO Q10

IF BUYS EGGS AT Q5 CONTINUE TO Q8

FILTERED (IF BUY EGGS)
Q8
When you buy eggs, which of these do you normally buy?

Note to Interviewer: If respondent does not actually buy eggs but has their own source e.g. they own chickens, they should still detail the type of eggs they produce.

ONE ANSWER, DO NOT ROTATE
READ OUT

1	**Organic eggs**	
2	**Free-range**	
3	**Battery (factory)**	
4	**Any / No preference**	
9	**(Don't know/Ref)** *DO NOT READ OUT*	

FILTERED (IF BUY EGGS)
Q9
Continuing with eggs, are the following factors very important, fairly important or not important to you?

ONE ANSWER FOR EACH OPTION
OPTIONS TO BE ROTATED

	READ OUT	**Very important**	**Fairly important**	**Not important**	**(Don't know/Ref)** *DO NOT READ OUT*
		1	**2**	**3**	**9**
9.1	**Freshness**				
9.2	**Low price**				
9.3	**Organic**				
9.4	**Treatment of the hens**				
9.5	**Hens are not treated with antibiotics or hormones**				

ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q9 AND THOSE FROM Q6 or Q7 (i.e. all respondents):

IF DOES NOT BUY MEAT AT Q5 GO TO Q12

IF BUY ANY OF THE MEAT PRODUCTS (Chicken, Bacon and/or Ham, Beef) AT Q5 CONTINUE TO Q10

FILTER (IF BUY MEAT)
Q10
When you buy meat, how often, in general, do you buy organic?

ONE ANSWER
READ OUT

1	**Always**	
2	**Sometimes**	
3	**Rarely**	
4	**Never**	
9	**(Don't know/Ref)** *DO NOT READ OUT*	

ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q10 AND THOSE FROM Q8 (i.e. all respondents):

IF DOES NOT BUY BEEF AT Q5 GO TO Q12

IF DOES BUY BEEF AT Q5 CONTINUE TO Q11

FILTERED (IF BUY BEEF)
Q11
Now thinking specifically about beef … are the following factors very important, fairly important or not important to you?

ONE ANSWER FOR EACH OPTION
OPTIONS TO BE ROTATED

	READ OUT	Very important	Fairly important	Not important	(Don't know/Ref) *DO NOT READ OUT*
		1	2	3	9
11.1	Treatment of the animal				
11.2	Slaughtering methods				
11.3	Low price				
11.4	Raised outdoors for part of the year				
11.5	Animal is not treated with antibiotics or hormones				

ALL RESPONDENTS
Now about information and labelling…

Q12.
Thinking generally again about food from farm animals (such as meat, eggs and dairy), is it very, fairly or not important to include the following information on the label?

ONE ANSWER FOR EACH OPTION
OPTIONS TO BE ROTATED

	READ OUT	Very important	Fairly important	Not important	(Don't know/Ref) *DO NOT READ OUT*
		1	2	3	9
12.1	A simple welfare assurance mark				
12.2	A welfare grading system like a different number of stars				
12.3	Information about where the animals are kept				
12.4	Information about what the animals eat				
12.5	Country of origin				
12.6	What farm they come from				

ALL RESPONDENTS
Q13
Thinking about information on farm animal welfare, would you use the following sources of information if available?

ONE ANSWER FOR EACH OPTION
OPTIONS TO BE ROTATED

	READ OUT	**Yes**	**No**	**(Don't know/Ref)** *DO NOT READ OUT*
		1	**2**	**9**
13.1	**Product labelling**			
13.2	**In-store information**			
13.3	**Internet/web-site information about the product**			
13.4	**Information from newspapers, TV or other media**			

ALL RESPONDENTS
Q14
To what extent do you agree or disagree with the following statements on a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree? As before, you may choose any number from 1 to 5.

ONE ANSWER FOR EACH OPTION
OPTIONS TO BE ROTATED

	READ OUT	**Strongly disagree** →				**Strongly agree**	**Don't know/Ref** *(DO NOT READ OUT)*
		1	**2**	**3**	**4**	**5**	**9**
14.1	**I care about animal welfare, but it's too time consuming to look for welfare friendly products**						
14.2	**I find it unappealing to handle raw meat**						
14.3	**It's wrong to eat food from animals that have not had a good life**						
14.4	**I feel sufficiently informed about farm animal welfare**						
14.5	**To improve farm animal welfare, we must be willing to pay a higher price for food**						
14.6	**My religion affects the kinds of foods I eat**						
14.7	**When eating, I don't like to think of meat as coming from live animals**						
14.8	**I care about animal welfare but cannot find welfare friendly products where I shop for food**						

ALL RESPONDENTS
Q15
In your opinion, how well do you think the welfare conditions are for the following farm animals in {COUNTRY}, on a scale of 1 to 5, where 1 is very poor and 5 is very good?

ONE ANSWER FOR EACH OPTION

	READ OUT	Very poor →				Very good	Don't know/Ref *(DO NOT READ OUT)*
		1	2	3	4	5	9
15.1	Pigs						
15.2	Chickens						
15.3	Dairy cows						

ALL RESPONDENTS
Q16
And what about the methods used to transport animals in {COUNTRY}, using the same 1 to 5 scale, where 1 is very poor and 5 is very good?

ONE ANSWER

Very poor →				Very good	(Don't know/ref) *(DO NOT READ OUT)*
1	2	3	4	5	9

ALL RESPONDENTS
Q17
And, in your opinion, how well do you think the animals are treated at the slaughterers in {COUNTRY} on a scale of 1 to 5, where 1 is very poor and 5 is very well?

ONE ANSWER

Very poor →				Very well	(Don't know/ref) *(DO NOT READ OUT)*
1	2	3	4	5	9

ALL RESPONDENTS
Q18
In general, over the past 10 years, do you think that farm animal welfare in {COUNTRY} has improved, is about the same or has got worse?

ONE ANSWER
PROBE FOR LITTLE/A LOT

READ OUT

1	Improved	
2	About the same	
3	Got worse	
9	(Don't know/ref) *DO NOT READ OUT*	

ALL RESPONDENTS
Q19
To what extent do you agree or disagree with the following statements, please use a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree?

ONE ANSWER FOR EACH OPTION
OPTIONS TO BE ROTATED

	READ OUT	**Strongly disagree** →				**Strongly agree**	**Don't know/Ref** *(DO NOT READ OUT)*
	To what extent do you agree or disagree that	**1**	**2**	**3**	**4**	**5**	**9**
19.1	**good animal welfare will improve the taste of the meat**						
19.2	**good animal welfare will increase the volume of milk cows produce**						
19.3	**good animal welfare will benefit the reputation of our country**						
19.4	**good animal welfare will improve human health**						
19.5	**good animal welfare will cost more and put farmers out of business**						

ALL RESPONDENTS
Q20
And to what extent do you agree or disagree with the following statements? Again, on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree.

ONE ANSWER FOR EACH OPTION
OPTIONS TO BE ROTATED

Note to Interviewer 21.2: We are not providing definitions here – it is the respondent's own definitions/perceptions of organic and factory farms that are important

	READ OUT	**Strongly disagree** →				**Strongly agree**	**Don't know/ref** *(DO NOT READ OUT)*
		1	**2**	**3**	**4**	**5**	**9**
20.1	**Small-scale farming guarantees good animal welfare practices**						
20.2	**There is no difference between organic farms and factory farms when it comes to animal welfare**						
20.3	**It is acceptable to kill farm animals for food**						
20.4	**It is acceptable to hunt game animals for food**						
20.5	**Farm animals can feel pain like a human being**						

ALL RESPONDENTS
Q21
Imagine a scandal concerning the welfare of chickens in {COUNTRY}. Do you think that each of the following would tell you the whole truth, only tell you part of the truth or would give misleading information?

ONE OF THE FOLLOWING ANSWERS FOR EACH OPTION
ROTATE ITEMS

	READ OUT *[READ OUT EACH ITEM]*, **Would they tell……?**	**The whole truth**	**Only tell part of the truth**	**Give misleading information**	**Don't know/Ref** *(DO NOT READ OUT)*
		1	2	3	9
21.01	**Press, television and radio**				
21.02	**The food processing industry**				
21.03	**Food retailers**				
21.04	**Farmers or farmers groups**				
21.05	**Consumer organisations/watchdogs**				
21.06	**Animal protectionists**				
21.07	**Politicians**				
21.08	**Public food authorities (like the Food Standards Agency)**				
21.09	**Independent food experts (e.g. academics)**				
21.10	**The EU**				

Advice to Interviewer:
Farmers includes farmer groups and unions, Consumer organisations can be national or re-gional groups

ALL RESPONDENTS
Q22
How much do you think that your voice as a consumer counts, on a scale of 1 to 5, where 1 is very little and 5 is a great deal?

ONE ANSWER

Very little	→			**A great deal**	**(Don't know/ref)** *(DO NOT READ OUT)*
1	**2**	**3**	**4**	**5**	**9**

ALL RESPONDENTS
Q23
Have you done any of the following during the last twelve months?

ONE ANSWER FOR EACH OPTION
DO NOT ROTATE

	READ OUT	**Yes**	**No**	**Don't know/ref** *(DO NOT READ OUT)*
		1	**2**	**9**
23.1	**Complained to a retailer (supermarket) about the food they sell**			
23.2	**Boycotted any food types or brands in protest about food issues**			
23.3	**Bought particular foods or brands in order to encourage or support their sale, like fair trade**			
23.4	**Protested about food issues either in person, by phone, by letter or email**			
23.5	**Been a member of a pressure group or organisation which works to improve food**			

ALL RESPONDENTS
Q24
Have you ever visited a farm and seen animals being reared?

ONE ANSWER – PROBE IF YES

READ OUT

1	**Yes, once**	
2	**Yes, 2 or 3 times**	
3	**Yes, more than 3 times**	
4	**Live or have lived on a farm**	
5	**No, never**	
9	**(Don't know/ref)** *DO NOT READ OUT*	

ALL RESPONDENTS
Q25
Has your view on farm animal welfare been influenced by stories or information from the following sources over the last few years?

ONE ANSWER FOR EACH OPTION

	READ OUT **Has your view been influenced by ...**	**Yes**	**No**	**Don't know/Ref** *(DO NOT READ OUT)*
		1	**2**	**9**
25.1	**Mass media, like TV, radio, newspapers**			
25.2	**Friends, family and/or colleagues**			
25.3	**Animal protectionist campaigns**			
25.4	MASK IF Q24 = CODE 5 (NEVER BEEN TO FARM) **Visits to farms**			
25.5	**Product information/labelling**			
25.6	**Government advertising or information**			

Thank you. We've finished the survey, I would just like to ask a few quick questions that will help us analyse our responses.

ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q26:

IF SINGLE HOUSEHOLD AT SCREENING QUESTION S3, GO TO D3

IF MORE THAN 1 PERSON IN HOUSEHOLD AT SCREENING QUESTION S3, CONTINUE TO D1

FILTERED (IF PEOPLE IN HOUSEHOLD UNDER 18 OR OVER 80)
IF HOUSEHOLD AT S3 MORE THAN 1 AND DIFFERENCE BETWEEN 'TOTAL IN HOUSEHOLD' AND '18-80 HOUSEHOLD' AT S4 IS ONE OR MORE ASK ...
D1
How many children do you have in your household who are younger than 18 years old?

CHECK – THIS NUMBER PLUS S4 CANNOT BE MORE THAN S3

FILTERED (IF NOT SOLO HOUSEHOLD)
ONLY ASK IF MORE THAN 1 PERSON IN HOUSEHOLD AT S3
D2
And, which of the following best describes your household situation?

ONE ANSWER

READ OUT

1	**Married or a couple living with or without children**
2	**Single parent living with children**
3	**You live with parent/s**
4	**Other**
5	**Rather not say**

ALL RESPONDENTS
D3
What was the highest level of education you completed?

EACH COUNTRY TO INSERT CODES WHICH ARE RELEVANT TO THEIR COUNTRY'S EDUCATION SYSTEM

ONE ANSWER

DO NOT READ OUT, BUT PROBE AS NECESSARY

1	**Basic (7 years or less)**
2	**Intermediate 8-10 years or with vocational training**
3	**11-13 years (High school)**
4	**University low level – 1-3 years**
5	**University high level – more than 3 years**
97	**Refused**
99	**Don't know**

e.g.
UK = if necessary, probe for age when stopped education and probe/code as appropri-ate (according to approximate age of respondent):

DO NOT READ OUT

1 Left school at 16 or younger with no real qualifications
2 Left school at 16 with O Levels or CSE equivalent
3 Left school at 17/18 with A Levels/GCSE (or equivalent) or vocational further education (such as HNC/HND etc)
4 Completed first degree (BA/BSc, Bachelors)
5 Completed higher/postgraduate degree (MA, MSc, Masters, PhD etc.)
97 Refused
99 Don't know

ALL RESPONDENTS
D4
Which of the following descriptions suits your current situation? Are you …

ONE ANSWER

PROBE UNTIL THEY RESPOND

1	**Working (full or part-time)**
2	**Pensioner**
3	**Student**
4	**Unemployed**
5	**Full-time looking after the home**
6	**On full-time disability or sickness**
97	**Refused** *(DO NOT READ OUT)*
99	**Don't know** *(DO NOT READ OUT)*

ALL RESPONDENTS
D5
Do you live in a city, in a town or in the countryside?

ONE ANSWER

PROBE/CHECK AS REQUIRED

1	**In a city or suburb (over 200,000 inhabitants, incl. suburbs)**
2	**In a large town (over 80,000 inhabitants, incl. suburbs**
3	**In a small or mid-sized town (over 20,000 inhabitants)**
4	**In a rural area or village (countryside less than 20,000 inhabitants)**

ALL RESPONDENTS
D6
What is your household's net monthly income or benefits AFTER taxes?

WRITE IN YOUR LOCAL CURRENCY – WHOLE NUMBERS ONLY – NO COMMAS

1 Household's net monthly income or benefits after taxes (max. 9 digits)

97 Refused/prefer not to say GO TO D7
99 Don't know GO TO D7

FILTERED (IF REFUSED/DK INCOME)
D7
If I read out a list of net monthly income brackets; perhaps you can just say which bracket best fits your household income after taxes.

ONE ANSWER

READ OUT

USE VALUES AND CODES ON INCOME SHEET (TECHNICAL FILE) FOR YOUR CURRENCY

1	**Enter appropriate currency bracket here**
2	**Enter appropriate currency bracket here**
3	**Enter appropriate currency bracket here**
4	**Enter appropriate currency bracket here**
5	**Enter appropriate currency bracket here**
6	**Enter appropriate currency bracket here**
7	**Enter appropriate currency bracket here**
8	**Enter appropriate currency bracket here**
97	**Refused/Prefer not to say** *(DO NOT READ OUT)*
99	**Don't know** *(DO NOT READ OUT)*

ALL RESPONDENTS
D8
What, if any, is your religion?

ONE ANSWER

Read out only if necessary or as prompt – if Christian, probe for Catholic or Protestant or other

1	**None (include atheist/agnostic, humanist)**	
2	**Protestant (Church of England/Scotland, Methodist, Baptist, Presbyterian etc)**	
3	**Catholic**	
4	**Other Christian (e.g. Orthodox)**	
5	**Muslim**	
6	**Buddhist**	
7	**Hindu**	
8	**Jewish**	
9	**Sikh**	
95	**Other**	**Please specify**
97	**Refused** *(DO NOT READ OUT)*	
99	**Don't know** *(DO NOT READ OUT)*	

ROUTING FOR RESPONDENTS THAT HAVE COMPLETED D8:

IF NONE TO D8 GO TO CLOSING STATEMENT

IF ANY RELIGION TO D8 CONTINUE TO D9

FILTERED (IF HAVE A RELIGION)
D9
Apart from special occasions such as weddings, funerals and christenings, about how often do you attend religious services or gatherings?

ONE ANSWER

READ OUT

1	**Weekly**
2	**Monthly**
3	**Less often**
4	**Never**
97	**Refused** *(DO NOT READ OUT)*
99	**(Don't know/ref)** *(DO NOT READ OUT*

ALL - THANK YOU AND CLOSE

Each agency is to write their own closing statement in keeping with their own typical interview closure.

INTERVIEWER INSTRUCTIONS (FOR GREAT BRITAIN)

ANIMAL WELFARE STUDY

- **Background**

This survey is being conducted across Europe (Britain, France, Sweden, Norway, Italy, Hun-gary and The Netherlands) to find out people's attitudes to farm animal welfare. The survey is funded by the EU and is being coordinated by Animal Science universities and academic institutes across Europe. We have already conducted 25 interviews in each country to pilot the study and following the outcomes of this, we have developed a final questionnaire for the main survey. The main survey of 1500 interviews in each country is now taking place over the 2 week period commencing 12/09/2005.

- **Lessons from the Pilot Study**

The pilot study was extremely useful for developing the final questionnaire and interviewer feedback has been fully utilised. A small number of questions have been removed and interviewer advice and instructions have been added to the final questionnaire.

- **The Interview**

Introduction
We are keen not to 'scare' people off by introducing the animal welfare issue right at the beginning of the interview and so we have worded the introduction to explain that we are contacting them to discuss the food that they eat and the way it is produced.

The interview is quite long and so we have deliberately kept the introduction to a minimum. You will note however that there is additional text that *you have the option to use*. If you sense the respondent is wary of the purpose of the research, this text explains that it is not connected to selling, that it is being carried across Europe to get different the views of people living in different countries and that the study is for academic research.

Selection of households and respondent – the screening process
We are selecting households by RDD – it is important that you record the outcome of each call carefully as we will have to provide detailed contact and response rates. Only record in-eligible calls if they are ineligible for the survey and you have a known outcome (e.g. out of age range or a business/faxmodem number).

The scope of the survey is one person per household and you can interview people aged from 18-80 years. The person in the household will be selected using the first birthday rule.

Adapt this section according to your birthday rule procedure (below is the TNS UK in-struction for information only)

The respondent in each household will be selected randomly if they are in a household with other people. Of course this means that every time you get a household with only one adult 18–80 then you can interview them. There are no quotas!

If there are 2 adults in the household, the computer will select one or other person at random, so for 50% of the time in this case, you can continue with your contact.

If there are 3 or more adults, the computer will either select the person you are talking to or one of the other people – when it's not the person you are talking to, this is where you have to ask for the person with the next birthday – so the selection is random.

Always note the name, initial, date of birth or birth, or gender and something distinctive about the person who the computer selects – if you make an appointment, the next interviewer needs to know who to ask for because we have to keep trying this person in the household – you *cannot* select again or select someone else instead.

PLEASE NOTE DOWN ANY DIFFICULTIES YOU HAVE WITH THE SCREENING PROCESS

3 QUESTIONNAIRE TO RETAILERS

3.1 Definitions and Company Strategy

Is concern for animal welfare an important part of your overall corporate responsibility and image? Is concern for animal welfare something that you use to distinguish your company from your competitors?

If yes, what is your company's strategy with respect to animal welfare (or what commitments does your company make)? To what extent does your strategy differ from your competitors? (proactive versus reactive). Does the animal welfare commitment involve manufactured brands, own brands?

What aspects of animal welfare is your company particularly concerned with? (e.g. transport of live animals, battery hens and so on)

Is it something that your company actively seeks to support through its practices relating both to the acquisition of animal products and their sale?

How relevant is animal welfare to the sale of animal products in your company?

We have noticed a number of animal products in your store that make explicit reference to animal welfare. How is your store assortment decided upon? Who decides which animal welfare products are sold instore? (company strategy, local store owners, response to consumer demand) Why do you sell them? Is it anything to do with the fact that they are animal welfare friendly or are there a variety of reasons?

3.2 Perception of Demand

Particular types of consumer are more likely to buy animal welfare-friendly products than other types of consumers. If so, which types? Why do you think this is? Is it simply a question of different concerns, or different willingness/ability to pay? Does this vary geographically? If so, how?

What sort of customers do you wish to target specifically?

Which are your most popular animal welfare-friendly products that consumers buy in your store? Which brands? Which product type? (e.g. chicken, pork, beef)

Over the last year or so, has consumer preference for these products altered the overall balance of products in this product range? Perhaps undermining others, competing with other brands, which has led to a restructuring of the market for these products.

Obviously there are a lot of issues that consumers are now concerned with: health, product quality, where food comes from, traceability, fair trade and so on. Where do you think concern for animal welfare comes in all this? Is it a leading concern, a lesser concern, or where do you think your consumers place it?

Do you feel, as a retailer, under any pressure from consumer groups, animal welfare organizations or your own customers: either to stock more products making reference to animal welfare, or to do more to promote animal welfare in supply chains, or to take products that are considered to be produced in a non-animal welfare-friendly way off the shelves?

Have you worked with such organizations or bodies in responding to their concerns?

Do products that indicate they come from animal welfare-friendly production generally cost more? Is the difference in price solely due to the fact that they are animal welfare friendly or are their other considerations in the pricing of these products? Are your consumers (or some of them) really willing to pay more for products that are animal welfare friendly?

Do you think, as a retailer, you have a role in making such products available to your clients in order to raise concern for animal welfare and educate consumers? Or do you feel rather that your role is to respond to your clients concerns by supplying them with products that refer explicitly to animal welfare because this is what they want?

Specifically for animal welfare, who do you think is responsible in the chain: you (retail), farmers, consumers or government?

3.3 Selling Welfare-friendly Products

Are animal welfare-friendly products a major factor in your profit/sales margins? What pricing strategy is used?

How is the price determined (both the price paid to the supplier as the consumer price)? Who is involved and who decides? Does you company use category captains (suppliers) that control the shelf and hence determine the strategy and price setting of welfare products?

Does your company have specific price promotions for animal welfare products?

Why/why not? Is the promotion strategy centrally or locally determined?

Do some animal products (product category (beef, pork, etc.) or one specific type of product) have more potential to being sold as welfare friendly than others, if so which (and why)?

Use prompts at this point: use products identified in the store from each of the five categories (one chicken, one beef, one pork, one dairy, one eggs – where available).

If we take this product (show example of manufacturer-label product), do you see it as being an animal welfare-friendly product or is that not an important component of the product, in terms of what your clients are looking for?

If we take your own store labelled products (show example of own-label product), can you tell us a little about the way animal welfare is addressed?

What, for example, do the various references on the packaging mean in terms of animal welfare?

What messages are you trying to convey with the package information, the presentation of the product and any images that might be on the label. What were the choices behind putting these particular bits of information or images on the packaging (legal requirements, traceability as well as selling)? What information would you not put on (e.g. slaughter conditions)?

Do you make explicit reference to animal welfare in the display of products (e.g. on meat counters, organic food displays, free-range egg displays and so on)? Do you have any policy regarding the display of such products (specified shelf space, distinct stands and so on)? Distinguish between own and industrial brands.

Do the meat products available at your in-store butcher's counter make any mention of animal welfare?

If we divide up the welfare-friendly products you sell into three categories:

- the products that are produced and packaged by food companies (give example with welfare-friendly indication on label);
- the meat products you sell in the in-store butcher's section;
- the products you sell under your own company label (give example with welfare-friendly indication on label).

Which of the three is the most important in terms of the sale of welfare-friendly products? As before, do you think animal welfare is a reason people buy these products?

Is animal welfare shelf-space likely to increase or decrease in next five years? Why?

Is it enough to say that a product is animal welfare friendly for it to sell, or does that message have to be packaged up with other quality attributes relating to the environment, health, territory and so on. How do you combine these different elements in your own supermarket labelling schemes (show example if possible)?

Do you think there should be:

- either some sort of generic animal welfare-friendly labeling scheme (like, say, for organic production);
- or do you think consumers prefer to see animal welfare as a component of quality products;
- or do you think higher animal welfare standards should be imposed and enforced on all animal products, so that there will no longer be any need to draw attention to it. (Should this be organized nationally or at a European level? By government or by industry (e.g. EurepGap?)

If you would like to see a generic welfare label, how might it look (welfare tick, like vegetarian, traffic lights). If such a system was adopted, do you think it would have an impact upon the sale of animal products that were not sold under the scheme?

Does the promotion of your sign (Coop, Carrefour, etc.) on TV, newspapers, etc. include the animal welfare commitment? Yes/No. Why?

3.4 Supply Chains

With regards to your supply chains in general, is animal welfare an issue for any/most of your suppliers? Do you expect your animal product suppliers to be providing products that have been produced in an animal welfare-friendly way? Is this something you pay attention to? Does it have any effect upon the price you pay for supplies?

Has the growing amount of EU regulation on welfare regulation had an impact on your supply chains?

Do you buy in a lot of organic animal product (%)? If so, do you (and your consumers) think this is intrinsically more animal welfare-friendly than non-organic products? Do you market it as such?

Manufacturer's Labels

Some (or may be all) of the products that explicitly refer to animal welfare you buy from manufacturers (give example). Is the fact that they are animal welfare friendly an important reason why you buy these products for sale in your supermarket or are there other more important reasons? (e.g. brand known and appreciated by the consumer, low price, etc.). Do you seek out products that mention animal welfare or does that aspect come simply as part of a product label?

If you impose animal welfare standards to some suppliers and you don't have an explicit animal welfare own label, why is this? Are you waiting for a better economic situation, a more sensitive consumer? Or do you buy animal welfare products because they are easily produced and are no longer a high cost production thanks to the recent EU policies?

Own Brand Labels

Other welfare-friendly products are sold under your own supermarket label or are available at your in-store butcher's counter (if this is the case). Can you tell us about the supply chain for these? Do you establish the conditions of animal welfare directly with the farmers or do you buy from cooperatives, wholesalers or abattoirs who set the welfare conditions for their suppliers?

- If the former, do you operate a farm assurance scheme or product assurance scheme? How are the conditions for these negotiated –- is it directly by company staff or do you go through farmer/producer organizations? What are the specific animal welfare conditions and how did your company decide upon them? Do you monitor them? Have they changed in recent years? If so, why and how?
- If the latter, do you intervene in the setting of these conditions, or the monitoring of compliance? Do you work through an external assurance or labelling scheme. Do you only buy animal products that are issued from such a scheme (can you give examples)?

If the welfare of animals is a concern when you purchase animal product supplies, what are the specific aspects of welfare that you look for? How have you chosen these aspects? Is this informed by science, by popular concerns, by expressed consumer demands (or all three)?

How does the organization and operation of animal product supply chains in general affect your ability to market products that specifically mention animal welfare quality? Does the general supply chain structure inhibit or facilitate this?

How would you like to see your animal welfare supply chains develop? What is infringing on this?

Finally, do you think that animal welfare is a genuine element in market segmentation. Do products labelled as animal welfare friendly sell within a distinct niche and is there the potential for this to grow? Or, alternatively, as animal welfare standards in general improve, do you think that this will be less and less important over the next five years as a way of differentiating products?

Thank you.

4 GUIDELINES FOR INTERVIEWS WITH SUPPLIERS

Following the retail audit, products were identified that had explicit reference to animal welfare friendliness on their packaging. The question then is:

Why are claims for higher animal welfare being used to sell this product?

This cannot be answered by solely asking retailers about the market for animal welfare-friendly foodstuffs. By going down the chain, using, for example, the products that appear on the audit, we gain an idea of the different dynamics and pressures that operate at different levels of the supply chain. All of which are important in determining how animal welfare at the farm level is translated and marketed to consumers.

By interviewing manufacturers/processors/wholesalers/abattoirs, it allows us to gain an understanding of the roles these supply chain actors have played in the current market for animal welfare-friendly products, its history, the role they have played in pushing for higher/lower levels of legislation (market interests, etc.) and their current role vis-à-vis animal welfare in the meat/dairy/egg industries.

We have found it quite easy to adapt the retailer interview to suit the interviews with suppliers. There are obviously some questions that do not need to be asked but generally the format is similar. Here is a general outline of questions for supply chain companies.

General Guidelines for Suppliers

- History of the company.
- Importance of animal welfare for the company, marketing of brand(s), etc.
- How does this manifest itself within relationships with producers, slaughterhouses, and production standards?
- How does a focus on animal welfare differentiate the company and its products within the wider market and its relations with retailers? (marketing strategies, pricing and premiums, pressures from retailers and consumers)
- How does animal welfare fit in with other concerns: quality, traceability, sustainability?
- Whose responsibility is animal welfare? Should it be dictated by statutory legislation or independent (segmentable) standards?
- Future of market for animal welfare-friendly products as well as wider ‘quality’ products, such as organic.

5 GUIDELINES FOR INTERVIEWS WITH REGULATORS

Who to Interview?

People in the broad domains of: animal health, food quality, animal welfare:

- public regulators (those who implement, those who enforce);
- those involved in strategy and policy development (including agencies outside government, e.g. the Farm Animal Welfare Council in the UK).

Why Interview?

There are some obvious agencies that are not included in the three work packages; the aim is to fill in these gaps through carrying out five strategic interviews.

What Do We Want to Know? Questions Related to Retail and Supply-chain Sector

1. Definition of animal welfare – how it is constructed as an area of policy interventionism (food safety, welfare, environment…)?
2. Role and understanding of their role (role with respect to wider food chain, EU and social demand, retailers, public regulation/private regulation).
3. Recent evolution of policy and regulatory change/development.
4. How does current policy/legal frameworks aid or hinder development of animal welfare?
5. (Big) Issues (animal welfare scheme, trade issues, labels, BSE and so on).

How do they see themselves with respect to other countries?

As an example of the role of legislation and regulation, the Food Safety Act in the UK introduced the concept of 'due diligence defence'. This has had a major impact on retailer activity in domain of animal welfare. As a result, most retail trade associations, e.g. British Retail Consortium, have food law departments. These can be include these in the research?

In Brussels:

- Eurogroup for Animal Welfare;
- European Food Animal Welfare Association.

What We Should Know Following the Interviews

- The history of farm animal welfare policy in each country.
- The regulatory history.
- Regulatory roles and procedure.

This would entail (for example, in the UK) talking to the Advertising Standards Agency, the Farm Animal Welfare Council, the Food Standards Agency, British Retail Consortium, Department for Rural and Environment Affairs.

We would anticipate around five interviews per country.

6 EXPLANATION OF QUALITY ASSURANCE SCHEMES NAMES

French Schemes

PDO: Protected Designation of Origin
AB: Organic Agriculture (L'Agriculture Biologique)
CCP: Certificate of Product conformity
CBPE: Charter for Good Farming Practice (Charte des Bonnes Pratiques d'Elevage)

Italian Schemes

PDO: Protected Designation of Origin
LAIQ: Legambiente for an Italian Quality Agriculture
IGP Vitellone Bianco: Protected Geographical Indication dell'Appennino
CONAZO: Consorzio Nazionale Zootecnico
QC: Quality Controlled

Dutch Schemes

KKM: Chain Quality Milk (Keten Kwaliteit Melk)
CONO Kaasmakers: Quality scheme hosted by a Dutch cheese factory
IKB Beef: Integrated Chain Control (Integraal Keten Beheer)
IKB Veal: Integrated Chain Control (Integraal Keten Beheer)
Scharrel: Free-range
Peter's Farm: Quality scheme hosted by a Dutch veal integrator

Norwegian Schemes

KSL: Quality System for Agriculture
Debio: Norwegian organic scheme

Swedish schemes

MHS: Swedish farmers environmental house inspection (Sveriges Bönders Miljöhusesyn)
Svensk Mjölk: Swedish Milk
Husdjursföreningarnas

Husbandry Society
Friskko: Healthy Cow
SvDhv Nöthälsan: Swedish Animal Health services scheme Cattle health
Naturbeteskött: Nature Pasture Meat
Felfri Hud: Faultless hide from KHI (owned by Swedish Meats)
KRAV Swedish organic certification label
Swedish Meat Gourmé

UK Schemes

ABP: Assured British Pigs
FF: Freedom Food
GQ: Genesis Quality Assurance
SA: Soil Association

7 BASIC QUESTIONNAIRE

General

- Farm size (ha, number of animals).
- Farm type (dairy, beef, calves etc).
- Farmer (age, gender, education, family situation, position/role of the interviewee).
- The marketing strategy.
- A short overview of the relevant history of the farm.

The Definition of Animal Welfare by the Farmer

- Definition of a good farmer.
- Ranking of five farming aspects on a Likert scale: animal health, animal welfare, economy results, environment, and food safety.
- How is the farmer's relationship towards his/her animals?
- How does the farmer define animal welfare?
- How does the farmer assess animal welfare, what type of criteria does (s)he use.
- A reflection on the animal welfare situation on the farm. What could still be improved? How does the farmer assess the welfare of his animals?
- How does the farmer assess his/her own knowledge on animal welfare? Is his/her knowledge sufficient?
- Does the veterinarian have a role in decision-making about animal welfare?

Regulations

- Farmer's knowledge on the animal welfare regulation, both EU and national.
- The farmer's assessment of current legislation, both EU and national, and the desirability of a 'level playing field'.
- To what extent does the farmer operate (concerning animal welfare) beyond the minimum requirements? Specify.
- Farmer's opinion on specific additional animal welfare requirements

- Outdoor exercise for cattle
- Ban on tethering of cattle
- Soft floor surface
- Comfort-improving measures like a brush
- Use of regular hoof trimming
- Dehorning with anaesthesia

Animal Welfare Schemes

- Does the farmer participate in animal welfare schemes and, if yes, in which one(s)?
- Farmer's motivation for scheme-participation.
- Advantages and disadvantages of quality assurance schemes
- Willingness to participate in a scheme with higher focus on animal welfare.
- Future expectations of quality assurance scheme.
- Possibility to work outside of any of such schemes nowadays.

If relevant:

No participation in an AWS

- The motivation not to participate.
- What could/would change this motivation?
- To what extent do the different AWS's interest the farmer? (Why (not)?)
- If not yet addressed to: to what extent does the farmer consider the requirements on animal welfare to be an obstruction to participate in the different AWSs.

Monitoring and control system

- In what way are the specific (animal welfare) requirements of the AWS controlled and monitored?
- How often is the farmer inspected? Is the inspection very tough/serious in his/her opinion?
- What are the strengths and weaknesses of this monitoring/control system?
- Possible improvements.

Knowledge and advise

- Which information sources for animal welfare does the farmer use?
- To what extent does the veterinary surgeon influence the farmer's ideas about and behaviour regarding animal welfare matters on the farm?

Transport and slaughtering of animals

- How does the farmer perceive the animal welfare situation during transport? What is necessary for 'good' animal welfare during transport? Should animal transport be improved?
- How does the farmer perceive the animal welfare situation during slaughter? What is necessary for 'good' animal welfare during slaughter? Should animal slaughter be improved?

Society, market and consumer

- How is the image of the farmer's production type with the general public?
- How do farmers perceive consumers? What are consumer's demands for animal welfare? Which role do consumers have in supporting animal-friendly production?
- How do farmers perceive other parties in society: retailers, government, animal welfare campaigners, and consumers? What is their role in supporting animal-friendly production?
- Do you think an animal welfare brand would 'sell'?

Future

- Should the cattle industry be concerned about animal welfare and an increased public interest in animal welfare now or in the near future? Why? Why not?
- What should farmers and their interest groups do to anticipate this increasing concern?

Welfare Quality Reports No. 7

Welfare®
Quality
Science and society improving animal welfare

This report is an official deliverable of the Welfare Quality® project.

Welfare Quality® is a European research project focusing on the integration of animal welfare in the food quality chain: from public concern to improved welfare and transparent quality. Welfare Quality® is co-financed by the European Commission, within the 6th Framework Programme, contract No. FOOD-CT-2004-506508.

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ISBN 1-902647-78-5
ISSN 1749-5164

SIXTH FRAMEWORK PROGRAMME

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