

Analysis of animal welfare initiatives in Europe



Otto Schmid
Rahel Kilchsperger

Research Institute of Organic Agriculture (FiBL)



Analysis of AW initiatives

Objective: Synthesis of current state of existing farm AW standards and initiatives in selected EU member states and 3rd countries

- Identification and analysis of AW initiatives: focus, content of standards, goals, actors, instruments
- Collection of market-relevant data (where made available).
- Grouping/Clustering of standards and initiatives
- Comparative analysis and reporting

=> To contribute to the development of policy instruments and options for improved animal welfare

Covered types of instruments

- **Legislation – governmental regulatory instruments**
 - EU legislation, National farm AW legislation, focus on differences to EU
- **Private regulatory schemes, often with labelling**
 - Market relevant standards and labelling schemes with and without third party certification/inspection
 - Innovative or new schemes with higher requirements than legislation
- **Financial incentives**
 - Direct payments for animal welfare,

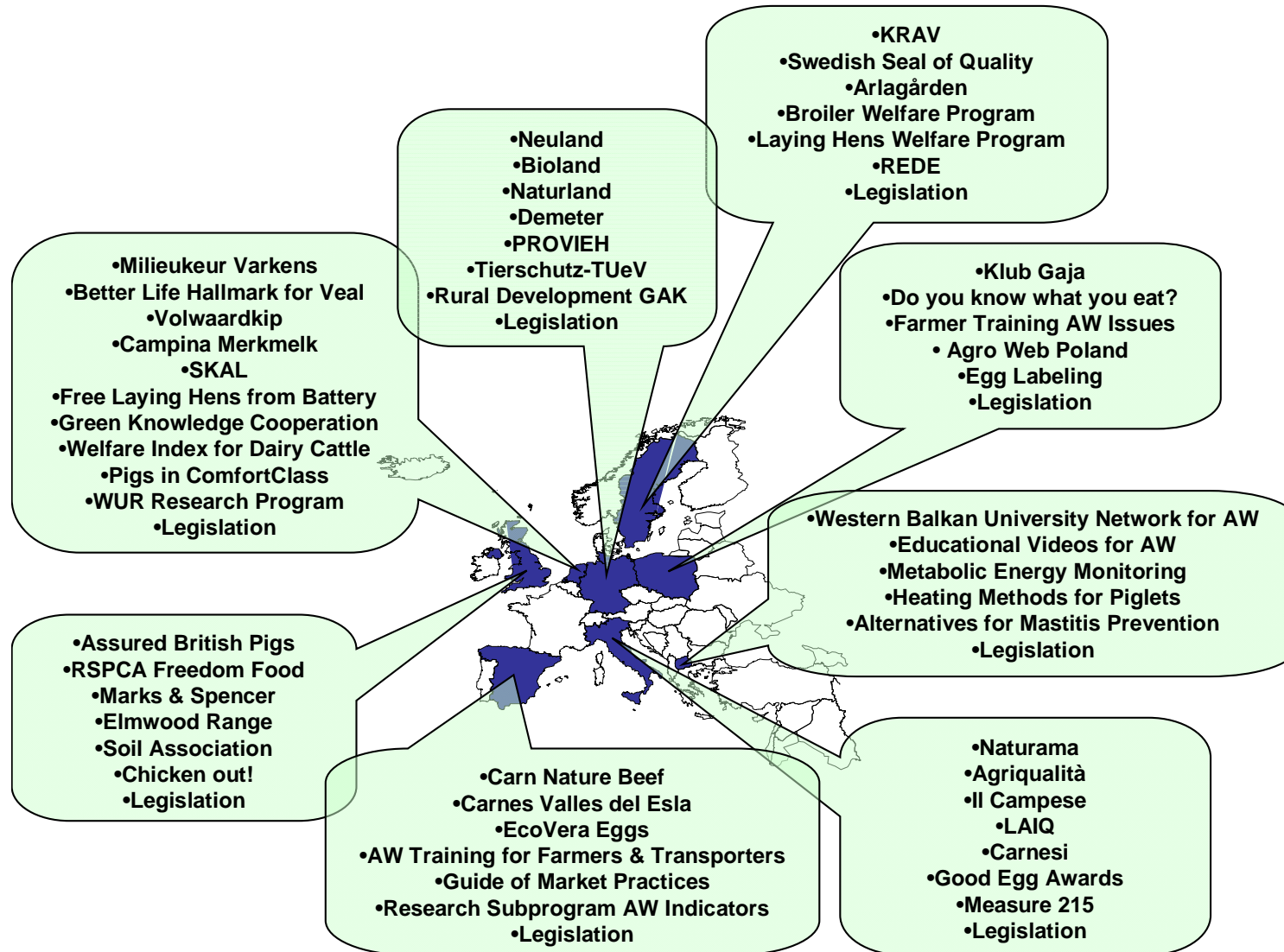
Covered types of instruments II

- **Information/education initiatives for higher awareness of AW**
- **Industry initiatives – Codes of practice**
 - Codes of practice for farmers, training of farm workers, animal health monitoring
- **Research**
 - Directly through finding solutions to AW problems
 - Indirectly by resulting in greater public and industry awareness in AW needs

Analysis of animal welfare initiatives

- **Standardised on-line survey** in Germany (DE), Italy (IT), Netherlands (NL), Poland (PL), Spain (ES), Sweden (SE), United Kingdom (UK) and Macedonia (MA).
- **Focus:** legislation and private standards schemes and non-regulatory initiatives.
- **Selection criteria:** market relevance and/or innovative approaches, coverage of main instruments
- **Collection of information** about actors, goals and instruments through national experts (mainly through project members + external experts)
- **Analysis was made in 2 steps:**
 1. analysis of 62 initially selected initiatives
 2. a more in-depth analysis and assessment with a newly elaborated clustering methodology and a higher number of initiatives (totally 84).

Initially collected AW initiatives with different instruments and types of species



Ex. 1: RSPCA

Freedom Food



- Closely linked to RSPCA – a charity concerning AW
- Freedom Food logo recognised by many UK consumers
- RSPCA AW standards based on scientific research, veterinary advice and practical farming experience - constantly being reviewed
- Above AW requirements of UK and EU legislation,.
- Standards cover all species of farm animals.
- Producer – compensation of higher costs
- Total number of farms complying: 1.016 farms with laying hens, 669 farms with broilers (2008);
- 52.5% of all laying hens in the UK assured by Freedom Food (2008),

Assessment of success of RSPCA-Freedom Food Initiative in UK

Assessed success of initiative	Very little				Very high success
Improving AW of the animals involved				X	
Creating awareness among citizens				X	
Generating a demand among consumers			X		
Inspiring others to develop new animal-friendly initiatives			X		

Types of AW initiatives analysed

- Altogether 84 initiatives = 7-14 per country
- 40 **regulatory initiatives** (with production rules either ruled by legislation or voluntary standards):
 - 7 governmental AW legislation;
 - 25 non-organic standards/labelling schemes on different levels and different involvement of chain actors;
 - 8 standards for organic production, including relevant EC organic regulation.
- 44 **non-regulatory initiatives** (with no livestock rules):
 - 29 education and information initiatives,
 - 5 research initiatives,
 - 3 internal quality assurance schemes,
 - 2 regional direct payment systems (financial incentive) .

Progressive aspects of private standards schemes with strong link to major retailers

- **IT-Naturama** (Esselunga wholesaler, strong brand, eggs, broilers, beef, high market share),
- **IT-Good Egg Awards** (AW NGO, several large companies, price for higher AW),
- **NL- Volwaardkip** (Cooperation of farmers, AW NGO and industry, robust broilers with outdoor run, niche),
- **UK-Mark&Spencer**. (large retailer, own farm assurance scheme with higher AW standards including imports)
- **UK-Elmwood Range** (improved AW standards, own standards + Freedom Food standards, market power)
- **UK-Soil Association** (organic standard above EU Organic regulation, partly also with supermarkets)
- **New GLOBALG.A.P** business to business standard of major retailers, world-wide impact

Interesting private standards schemes with strong link to specialist retailers

- **DE-Neuland** (highest AW standard in DE, short chains)
- all German organic standards: **Bioland, Naturland, Demeter** (all animal products, farmers lead)
- **IT-Carnesi** (organic, private company, meat),
- **NL-Milieukeur Varkens** (Food industry +AW NGO, pork, standards with point/bonus system, short chain)
- **PL-System Quality Meat Program** (new Quality assurance with improved AW, beef producers+chain)
- **SE-Arlagården** (milk producers, assurance scheme based on SE AW legislation, active follow up)
- **ES- Carnes Valles del Esla** (farmers group, chain development, niche market)
- **ES-Livestock markets** (lead by LM-Association, good practise guide)

Information and campaigns

- **DE-PROVIEH** (AW NGO)
- **NL-Free Laying Hens from Battery** (AW-NGO)
- **NL-Green Knowledge Cooperation**
- **NL-Adopt a chicken** (organic platform)
- **PL-Klub Gaja** (AW NGO)
- **PL- Do you know what you eat?** (AW NGO,poultry)
- **UK Good egg awards** (price for companies)

Education and training

- **ES-Training for Farmers & Transporters** (national wide, public-private partnership, courses)
- **PL-Farmer Training** (AW Issues, implementation EU rules)
- **SE-Broiler Welfare Program** and **SE-Laying hen welfare Programme**
- **UK-Codes of good agricultural practice**
- **SE-REDE** (2 AW-NGOs, school AW education)
- Several others with education and training but less predominant

Other initiatives – financial incentives, etc.

- **DE- GAK Rural Development** (few regional governments “Länder”, direct payments for AW)
- **IT- Measure 215** (Emilia Romagna, direct payments to farmers for AW measures)
- **CH- AW direct payments** (2 systems: outdoor access, free stable systems)
- **DE- Tierschutz-TUeV** (Approval system for husbandry equipment, NGOs, government recognition)
- **NL- Pigs in ComfortClass**
(assessment system with flexibility)

Factors considered as success in all analysed AW initiatives

	SUCCESS FACTORS	All initiatives	All Regulatory initiatives with production rules	Organic Regulatory initiatives	Non-Organic Regulatory initiatives	All NON-Regulatory initiatives - no production rules	Education and information initiatives
Question 1	Improving the welfare of the animals	3.7	4.0	4.4	3.9	3.4	3.2
Question 2	Creating awareness among citizens	3.2	3.4	4.0	3.3	3.0	3.2
Question 3	Generating a demand among consumers	2.7	3.1	3.6	3.0	2.4	2.6
Question 4	Inspiring others to animal-friendly initiatives	3.0	3.3	3.4	3.3	2.8	2.8

Main actors

ACTORS	ASPECTS	All initiatives	All Regulatory initiatives with production rules	Organic Regulatory initiatives	Non-Organic Regulatory initiatives	All NON-Regulatory initiatives - no production rules	Education and information initiatives
FARMING COMMUNITY	Farmers	1.2	1.4	1.8	1.3	1.8	0.8
	Farmers groups	1.2	1.5	1.8	1.4	0.9	0.9
CHAIN ACTORS	Retailers - specialist	0.4	0.7	1.3	0.5	0.2	0.1
	Retailers - major	0.7	1.0	1.0	1.0	0.4	0.4
	Abattoirs, processing industry	0.9	1.3	1.7	1.2	0.5	0.4
	Input industry	0.6	0.7	0.8	0.7	0.4	0.3
	Certification bodies	0.5	1.0	1.8	0.7	0.2	0.1
	Veterinarians	0.5	0.6	0.4	0.6	0.5	0.4
CIVIL SOCIETY ACTORS	NGOS - Animal welfare	0.8	0.6	0.6	0.6	1.0	1.2
	NGOS- Consumers	0.2	0.2	0.3	0.2	0.1	0.0
	NGOS - others	0.2	0.2	0.0	0.3	0.2	0.2
PUBLIC REGULATORY AND HALF-PUBLIC ACTORS	European Commission	0.5	0.6	1.0	0.5	0.4	0.3
	National governments	1.2	1.1	1.1	1.1	1.2	0.9
	Agencies	0.1	0.2	0.1	0.2	0.1	0.0
OTHER (PRIVATE) ACTORS	Researchers	0.9	0.7	0.6	0.7	1.1	1.0
	Media	0.4	0.4	0.8	0.2	0.5	0.7
	Political parties	0.2	0.3	0.1	0.3	0.1	0.2
	Celebrity chiefs	0.2	0.3	0.5	0.3	0.0	0.0
	Schools	0.1	0.1	0.3	0.0	0.1	0.2

Main actors and initiators

- **Main actors for standards and labelling schemes:** a great variation – depends on context, country
- **Farmers and farmers groups:** leading and reacting
- **Major retailers (for organic farming initiatives also specialist retailers):** in some countries leading
- **Processors and abattoirs:** often starting point quality assurance schemes and food safety issues.
- **Governments:** in general more on legislation
- **Initiators:** government (30%), farmers (27% / over 70% in the case of organic standards schemes) and industry or non-governmental organisations (33%)
- **In the non-regulatory initiatives:** AW organisations, industry and researchers have main roles.

Main goals

GOALS	ASPECTS	All initiatives	All Regulatory initiatives with production rules	Organic Regulatory initiatives	Non-Organic Regulatory initiatives	All NON-Regulatory initiatives - no production rules	Education and information initiatives
ANIMAL RELATED GOALS	Animal welfare: system	2.3	2.2	2.3	2.1	2.3	2.2
	Animal welfare: animal	1.7	1.5	1.9	1.4	1.8	1.7
	Sustainability	1.1	1.4	2.3	1.1	0.9	0.9
CHAIN RELATED GOALS	Profit in high value chain	1.0	1.3	1.8	1.1	0.7	0.4
	Competitive market	1.0	1.5	1.8	1.4	0.6	0.5
	EU livestock production	0.5	0.4	0.6	0.3	0.7	0.4
	Risk management in the chain	0.9	1.2	1.3	1.2	0.6	0.4
FARMER RELATED GOALS	Support farmers	1.3	1.4	2.0	1.2	1.2	1.0
	Farmers skills	1.3	1.2	1.4	1.1	1.4	1.2
SOCIETY RELATED GOALS	Awareness amongst target groups	1.7	1.5	1.8	1.4	1.9	2.3
	Knowledge AW	1.7	1.4	1.3	1.4	2.0	2.1
CONSUMER RELATED GOALS	Food safety	0.9	1.4	1.4	1.4	0.5	0.4
	Transparency	1.2	1.7	2.3	1.5	0.7	0.8
	Customer fidelity	1.2	1.7	2.4	1.5	0.7	0.6
	Consumer concerns	1.8	2.2	2.6	2.1	1.4	1.4

0 = not relevant, 1 = somewhat relevant, 2 = relevant, 3 = very relevant

Main goals

- Besides animal welfare, also awareness for consumers/citizens seen as important.
- Animal welfare related goals: more oriented to the system (stable etc.) than directly to the welfare state of animals.
- Profit in high value as well as competitive market generally low importance, but number of industry driven initiatives is rising
- Country differences: depends on state of development of AW
- Consumer-related goals, in particular consumer concerns, are highly valued in DE, IT, NL, SE and UK.

Main instruments

INSTRUMENTS	ASPECTS	All initiatives	All Regulatory initiatives with production rules	Organic Regulatory initiatives	Non-Organic Regulatory initiatives	All NON-Regulatory initiatives - no production rules	Education and information initiatives
REGULATORY	Regulation: Public	1.2	1.5	2.7	1.2	1.0	0.6
	Regulation: Private	1.2	1.8	1.9	1.8	0.6	0.6
	Penalties (fine)	0.9	1.5	2.0	1.3	0.4	0.3
	Cross Compliance	0.2	0.3	0.0	0.3	0.1	0.1
LABELLING	Labeling: Public	0.5	0.8	2.4	0.3	0.2	0.2
	Labeling: Private	1.3	1.9	1.9	1.9	0.7	0.7
FINANCIAL, INCENTIVES	Incentives: Public	0.3	0.2	0.1	0.3	0.4	0.2
	Incentives: Private	0.9	1.5	2.2	1.2	0.3	0.3
ASSURANCE, GUIDANCE	Codes of practise: Public	0.8	0.9	1.2	0.8	0.7	0.5
	Codes of practise: Private	1.2	1.7	2.2	1.6	0.7	0.5
EDUCATION, INFORMATION	Education: Public	0.6	0.4	0.2	0.4	0.8	1.0
	Education: Private	0.7	0.6	1.0	0.4	0.8	0.9
	Training: Public	0.5	0.3	0.1	0.4	0.6	0.7
	Training: Private	0.6	0.8	1.4	0.6	0.4	0.4
	Information: Public	0.9	0.9	1.2	0.8	0.8	0.9
	Information: Private	1.2	1.3	2.0	1.1	1.2	1.5
DEVELOPMENT	Research: Public	0.8	0.6	1.1	0.5	0.9	0.7
	Research: Private	0.5	0.5	0.6	0.5	0.5	0.4

0 = no use at all, 1 = rarely used, 2 = sometimes used, 3 = main instrument

Main instruments of AW initiatives

- One of the most common instruments to promote animal welfare is legislation – very limited to raise AW
- Many private standards schemes (majority with third party control) often combined with penalties and with labelling which may be public (public only for organic products) or private;
- Financial incentives (private more important than public). Only few governmental direct payments schemes.
- Codes of practise: often broader assurance schemes without third party control/certification) in combination with minimum AW standards requirements - often industry-driven
- More private information campaigns and/or education on AW, only few public.

Weaknesses of AW initiatives

- Goals sometimes too narrow (e.g. more focus on technical stable systems than on Animal Welfare)
- Some instruments are not used sufficiently in combination with each other (e.g. labelling schemes with education in non-organic schemes).
- Some important or potentially interesting actors are neglected or even not enough involved (e.g. farmers in campaigns or in research design).
- The potential of networking and public-private partnership not fully explored and used.

4 standards development lines initiated by the private sector and partly governments

Based on analysis and assessment there are currently mainly four development lines beside EU and/or national legislation development, which is limited.

1. a **modest improvement** of basic AW through better implementation of legislation and Codes of Practice and general assurance schemes.
=> allows a large number of farms to participate, Important starting point to raise awareness,
but on a lower level, still too much top-down

Standards middle level development line

A **middle level approach** of several large retailers, like with GLOBALG.A.P . (integrating in company standards animal welfare; ensuring through a business to business cooperation model).

=> potential for strong uptake through big market power, important for harmonisation on international level, puts pressure on governments and actors.

but top-down approach, with little farmer involvement and generally no financial incentives for farmers and strong dependency of supermarkets.

Standards middle level development line II

Another **middle level approach** of mostly local or regional initiatives, where AW is integrated in their requirements as part of a social corporate responsibility and sustainability policy (e.g. in some local marketing initiatives and in community supported agriculture systems).

=> potential for an uptake of some more sensitive issues (like reduction of transport, more consumer-accessible and animal-friendly stable systems)

but often limited to selected AW requirements, mostly with few farmers in the region

Standards highest level development line

A further development and implementation of **highest animal welfare standards level** (like DE-Neuland and UK-Freedom Food/RSPCA or private labels in the organic sector like DE-Bioland or UK-Soil Association).

=> Important niche drivers and pioneers, (e.g. for the introduction of more animal-based indicator systems).

High potential for cooperation with much broader actor networks (including supply chain actors and research institutions).

*But remaining generally in a niche market,
Limited by the number of farmers, needs
high willingness to pay a higher price.*

Standards development line on high level II

The integration of **higher animal welfare requirements** in the **rules for organic farming** as already done in the EC regulations 834/2007 and 889/2008 (higher level than before) and in private organic standards

⇒ *Potential to integrate higher animal welfare rules in further developed organic legislation combined with high sustainability rules,*

⇒ *but reorientation towards more animal-based criteria and indicators necessary*
Limits with overregulation

Role of public bodies – AW governance

- Until now government mostly involved with AW regulation – very linear and limited approach.

The role of the public bodies in a more dynamic governance model would be:

- to interact in a participatory process with private actors;
- to design better framework conditions to translate multiple goals with the best effectiveness and efficiency for improving AW (on different levels);
- to facilitate the formation of multiple acting and learning networks; and
- to develop and combine appropriate instruments – possibly in public-private partnership (synergies!).

Classical policy setting often in beginning

Classical policy setting



No governance – only legal framing

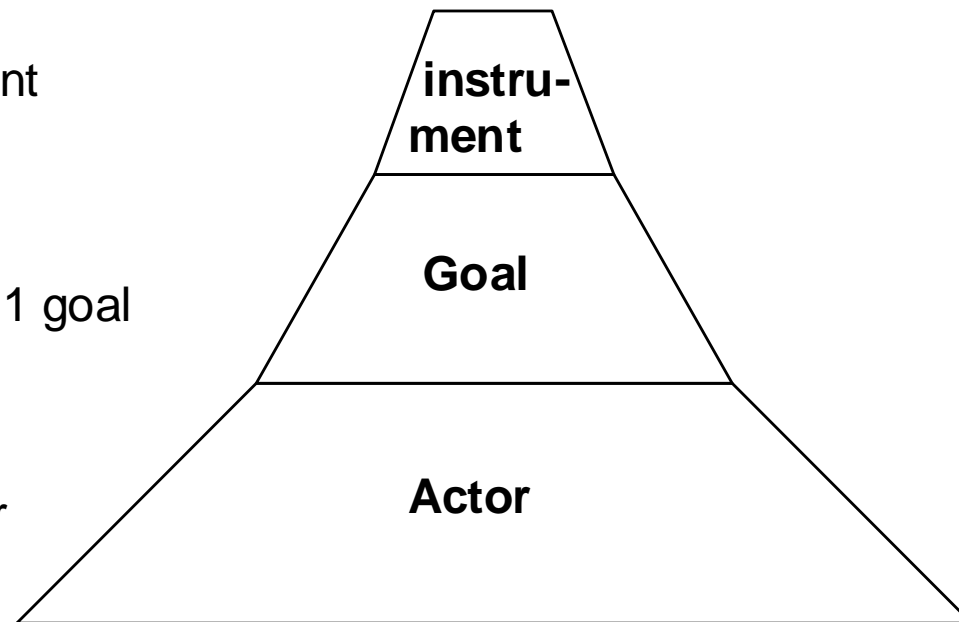
Legislation = 1 instrument



Better Animal welfare = 1 goal



Government – 1 actor



Dynamic governance model to be developed over time

Dynamic governance model

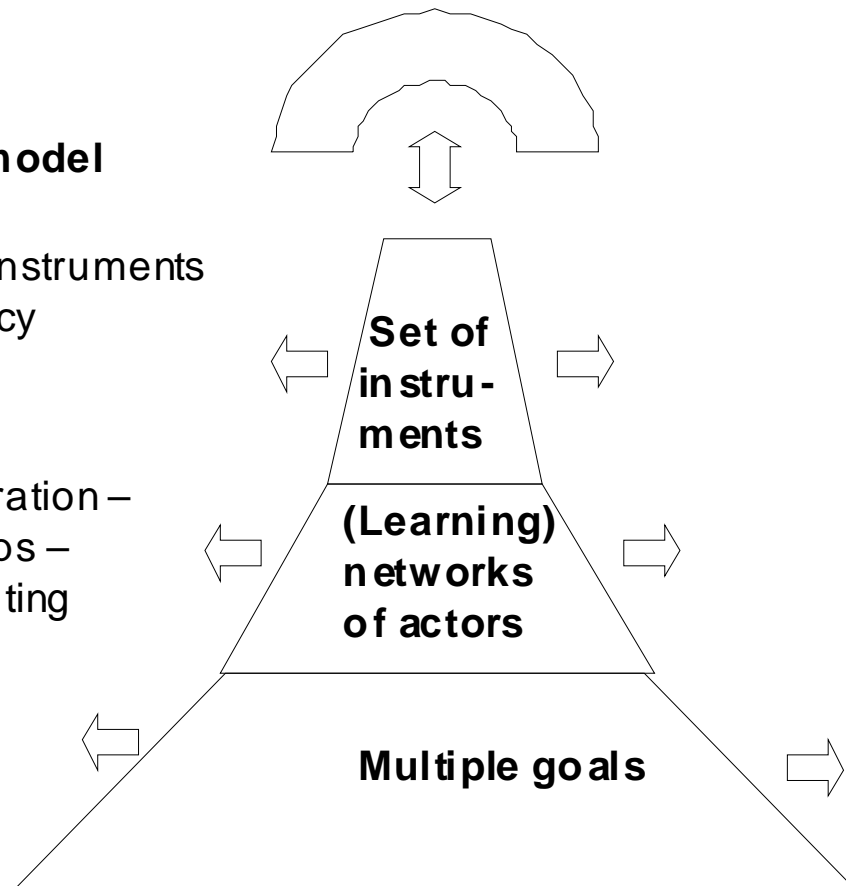
Optimised mix of policy instruments
Effectiveness and efficiency



Different forms of cooperation –
private-public partnerships –
common learning and acting



Animal – society – chain
goals and perspectives



Country-specific approaches needed

- Certain hierarchy in levels of animal welfare, awareness and skills, which differ from country to country.
- Because of these differences, it is important that that an optimised dynamic governance model (e.g. an optimised mix of policy instruments) should be tailor-made for the context of a country (and region).

Thank you for your attention



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