

Marketing Farm animal welfare



For a long time legislation has been the commonest way of protecting farm animal welfare but more recently growing consumer demand both for quality food products and more ethical food production has meant that farm animal welfare is emerging as an area of potential added value for producers, retailers and other food chain actors. To support chain actors in their efforts, Welfare Quality[®] has been investigating the impact of these new consumer demands, and the current industry responses to them. Research carried out by Welfare Quality[®] in Norway, Sweden, the Netherlands, the UK, France and Italy looked at how animal welfare is mobilised from farm to supermarket shelf as a means of both achieving increased product value and broader ethical branding.

Animal Welfare and product differentiation

Two main groups are driving the segmentation of food products and product ranges on the basis of animal welfare:

- consumers, seeking to buy products from farms with higher standards of welfare.
- food chain actors (retailers, processors, manufacturers, producer cooperatives) exercising and displaying their ethical responsibilities.

Welfare Quality[®] research shows this market segmentation operates in two, often related, ways: a) through the use of specific welfare claims on products and, b) the inclusion of welfare conditions within supply chain assurance schemes.

Through a detailed inventory and assessment of food products with welfare claims available to consumers across Europe, Welfare Quality[®] research shows significant use of animal welfare as a component of product differentiation.

Statements that are perceived to be linked to animal welfare such as 'free range', 'grass fed', 'outdoor reared', 'absence of growth promoters' and 'slower growth' are appearing on a large number of animal-based food products.

In some countries, more than 100 such products were identified.

However, Welfare Quality[®] research also shows that specific welfare conditions are increasingly included as part of quality assurance schemes used by abattoirs, transporters and farmers. This new strategy shows that animal welfare is often important for market access and that more products conforming to additional welfare standards are entering the market than a census of only identifiable product labelling would suggest. This indicates that animal welfare is becoming a component of broader notions of quality. It also shows the ethical and quality commitment of food suppliers to their consumers.

Animal Welfare and product quality

Despite the growth in the use of welfare conditions revealed by our study, there are very few dedicated animal welfare labelling schemes. In general, improved animal welfare is communicated to consumers in three ways:

- the active use of animal welfare claims on product packaging;
- the use of independent labels that support a particular production system considered to



This research was executed within the first Subproject of Welfare Quality®.

It investigates societal attitudes and practices among consumers, farmers and retailers, as they impact upon animal welfare. It assesses to what extent new welfare strategies might be achievable in practice. Subproject leader is Unni Kjærnes, Unni.Kjærnes@sifo.no

offer better welfare to animals;
• and through the bundling of a range of desirable product qualities implicitly conveyed through a brand.

Welfare Quality® research shows that while many food producers and suppliers welcome the growth of welfare conditions as a component of product and brand differentiation, the use of dedicated stand-alone welfare labelling is not widely supported. Tighter standards of animal welfare are seen as contributing to the quality of the product – as well as the quality commitment of the producer and supplier. That is why animal welfare is usually bundled up with other product ‘qualities’ such as nature, tradition, environmental benefits, and organic production, thus appealing to a wide range of consumer interests and concerns. Across Europe, clear differences emerge with French and Italians often favouring gastronomic qualities while the northern countries more often link welfare with environmental concerns.

Animal Welfare and added value

Animal welfare is a component of added value. Not only can improved animal welfare conditions contribute to the generation of higher commodity prices, but lower welfare conditions are proving costly. That cost comes through harmful effects on the animals’

health, productivity and product quality, and when producers are unable to access higher value markets or respond to consumer demand. In different European countries, Welfare Quality® research has shown how producer groups, manufacturers and retailers have responded to this potential in different ways, yet a number of common challenges remain.

Because of the nature of the premium market, only some cuts can be sold as premium quality products that benefit from value addition, so the opportunity remains to find a premium market for as many products as possible from animals produced to high welfare standards. Assessment procedures, critical to the validity of welfare claims, need to be flexible enough to support diverse brand demands and encourage welfare improvements throughout the food chain. The Welfare Quality® assessment will offer a flexible tool to compliment the market’s diverse welfare commitments and, by introducing animal based parameters, will provide greater clarity to welfare claims. Through appropriate regulation and market mechanisms working together to raise the welfare quality of European farm animals, suppliers and consumers alike can benefit.

Dr Emma Roe, E.J.Roe@soton.ac.uk
Prof Henry Buller, H.Buller@exeter.ac.uk



Project Coordinator

Prof. Dr Harry J. Blokhuis, The Netherlands
harry.blokhuis@hnh.sl.u.se

Project Office Welfare Quality®

Animal Sciences Group of Wageningen UR
Postbox 65, 8200 AB Lelystad
The Netherlands
Phone: +31 320 293503
Fax: +31 320 238050
e-mail info@welfarequality.net

www.welfarequality.net

Welfare Quality® is a European research project focusing on the integration of animal welfare in the food quality chain. The project aims to accommodate societal concerns and market demands, to develop reliable on-farm monitoring systems, product information systems, and practical species-specific strategies to improve farm animal welfare. Forty-four institutes and universities, representing thirteen European countries and four Latin American countries, participate in this integrated research project.

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