

Farm Animal Welfare Concerns

Consumers, Retailers and Producers

edited by
Joek Roex
Mara Miele



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WELFARE QUALITY REPORTS NO. 1

This report is dedicated to the memory of Jaap Frouws.

School of City and Regional Planning
Cardiff University
Glamorgan Building
King Edward VII Avenue
Cardiff
CF10 3WA
Wales
UK
Tel.: +44(0)2920874709; fax: +44(0)2920874845;
e-mail: roex@cardiff.ac.uk

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CONTENTS

	<i>Preface</i>	<i>iii</i>
PART I	Consumer Concerns for Food Animal Welfare	
	PART IA Literature Reviews (edited by Ingrid Kjørstad)	
1	Introduction	3
2	Consumers and Consumption	5
3	Institutional Context	23
4	Two Comparative Studies and EU Statistics	37
5	Concluding Remarks about the Literature	45
6	Key Studies	51
	PART IB Theoretical Framework (edited by Unni Kjærnes)	
7	Introduction	53
8	Consumers and Animal Welfare	55
9	Implications for the Welfare Quality Project and Consumer Studies	71
10	Concluding Remarks about the Theoretical Framework	79
PART II	Retail Structures (edited by Jonathan Murdoch)	
11	Introduction to Part III	83
12	Norway	85
13	Sweden	89
14	The Netherlands	93
15	United Kingdom	97
16	France	101
17	Italy	107
18	Conclusions to Part II	111
PART III	Socio-political and Market Developments (edited by Bettina B. Bock and Freek van Leeuwen)	
19	Introduction to Part III	115
20	Animal Welfare Legislation	117
21	Animal Welfare Schemes	125
22	The Political and Social Context of Animal Welfare	143
23	Conclusions to Part III	149
	Bibliography	151
	Appendix	167

PREFACE

Animal welfare is of considerable importance to European consumers. Nowadays food quality is not only determined by the overall nature and safety of the end product but also by the perceived welfare status of the animals from which the food is produced. The fact that improving the animal's welfare can positively affect product quality, pathology and disease resistance also has a direct bearing on food quality and safety.

The Welfare Quality project is about integration of animal welfare in the food quality chain: from public concern to improved welfare and transparent quality. 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 animal welfare. Throughout this Integrated Project, effort is focused on three main species and their products: cattle (beef and dairy), pigs, and poultry (broiler chickens and laying hens).

The research programme is designed to develop European standards for on-farm welfare assessment and product information systems as well as practical strategies for improving animal welfare. The standards for on-farm welfare assessment and information systems will be based upon consumer demands, the marketing requirements of retailers and stringent scientific validation. The key is to link informed animal product consumption to animal husbandry practices on the farm. The project therefore adopts a 'fork to farm' rather than the traditional 'farm to fork' approach. Welfare Quality will make significant contributions to the societal sustainability of European agriculture.

This publication brings together the reports produced within the three work packages in subproject 1 during the first year of the project. This subproject investigates societal attitudes and practices as they impact upon animal welfare and assesses to what extent new welfare strategies might be achievable in practice. It has three main work packages concerned with consumers, retailers and producers, respectively. Each work package investigates how these groups view welfare considerations and determines how they might be persuaded to adopt more rigorous welfare standards. Work package 1.1 analyses consumer concerns about food animal welfare, the type of information demanded, and the most effective communication and information strategy. Work package 1.2 evaluates the current and potential market for welfare-friendly animal based food products, welfare label characteristics, and inspection systems. Work package 1.3 identifies potential barriers to the development of animal friendly products faced by producers.

Part I of this report consists of the literature review and theoretical framework for the consumer studies. The comparative literature review was collated by Ingrid Kjørstad is largely based on the extensive country reports of literature reviews. Due to the partners'

different approaches, there is a diversity visible in the descriptions of the countries' knowledge statuses, affecting comparison. The different country reviews are prepared by the following partners of Work Package 1.1:

Jean-Pierre Poulain, Laurence Tibere, Sandrine Jeanneau, Alex Miles (*France*)
Liesbeth Schipper, Volkert Beekman, Michiel Korthals (*The Netherlands*)
Mara Miele, Antonella Ara, Francesco Vanni (*Italy*)
Richard Bennett, Wallace Yee (*United Kingdom*)
Lucas Pettersson, Hanna Bergman (*Sweden*)
Unni Kjærnes, Ingrid Kjørstad (*Norway*)

The theoretical framework has been collected by Unni Kjærnes on the basis of the individual contributions of:

Mara Miele (*Italy*)
Michiel Korthals (*The Netherlands*)
Richard Bennett (*United Kingdom*)
Cathal Cowan (*Hungary*)
Lucas Petterson (*Sweden*)
Jean Pierre Poulain (*France*)
Unni Kjærnes (*Norway*)

Part II presents the analysis of retail structures in the six study countries, collated by Jonathan Murdoch on the basis of the individual contributions of:

Henry Buller, Christine Cesar (*France*)
Filippo Arfini, Cecilia Mancini (*Italy*)
Menno Binnekamp (*The Netherlands*)
Eivind Jacobsen (*Norway*)
Ulf Johansson, Karin Alm (*Sweden*)
Jonathan Murdoch, Emma Roe (*United Kingdom*)

Part III reports on socio-political and market developments of animal welfare schemes, collated by Freek van Leeuwen and Bettina Bock on the basis of individual contributions of:

Anne-Charlotte Dockès, Florence Kling-Eveillard (*France*)
Alberto Menghi, Kees de Roes, Paolo Rossi (*Italy*)
Carmen Hubbard, Michel A. Bourlakis, Guy Garrod (*United Kingdom*)
Karl Bruckmeier, Madeleine Prutzer (*Sweden*)
Guro Skarstad, Svein Borgen (*Norway*)
Bettina B. Bock, Freek van Leeuwen (*The Netherlands*)

Joek Roex
Mara Miele
Cardiff, October 2005

PART I

CONSUMER CONCERNS FOR FOOD ANIMAL WELFARE

A: LITERATURE REVIEWS

edited by

Ingrid Kjørstad

The National Institute of Consumer Research SIFO, Norway

and

B: THEORETICAL FRAMEWORK

edited by

Unni Kjærnes

The National Institute for Consumer Research (SIFO), Norway

LITERATURE REVIEWS: INTRODUCTION

Task 1.1.1 of the Welfare Quality Project is a review of consumer strategies and demands for animal friendly products. The main objective is: to provide a conceptual framework for consumer concerns and practices relevant for the demand and distribution of animal friendly products under different circumstances.

Subtask 1.1.1.1 comprises a summary review of the literature. Specific objectives are: to review existing knowledge of consumer beliefs, concerns, expectations, and use of information on animal friendliness, with particular emphasis on product labelling in all participating countries: to present a summary of the literature on ethical and political consumption, credence goods, and communication strategies presented in the country reviews.

This report's main focus will be to point out differences and similarities regarding consumers and consumption, between the participating countries. Information for this purpose is mainly gathered from the extensive literature reviews written by the partners in SP1 WP1.1: the UK, the Netherlands, Italy, France, Sweden and Norway (references of authors can be found in the general Preface to this report). Information from WP 1.2 has also been a good help. Furthermore, Mara Miele, Unni Kjærnes and Hanna Bergman have contributed the summaries in Chapter 4, and the presentation of the market structures in Chapter 3 draws on a presentation by Jonathan Murdoch.

2

CONSUMERS AND CONSUMPTION

2.1 STATISTICS

In this paragraph we present an overview of the statistics from the Food Balance Sheets and the six different country reports regarding consumption and wholesales of beef, pork, sheep, poultry, eggs and milk. The aim is to get an overview of how important these products are in the food culture in the various countries and to get some insight into changes that have taken place.

In the first section we present figures gathered from the 2002 Food Balance Sheets, in order to give a broad picture of food consumption levels in the study countries. For further data and time series, see the Food and Agricultural Organizations Statistical Databases, <<http://faostat.fao.org/>>.

In the second section, we present the statistics gathered from the six country reports. These figures differ regarding sources, level of measurement, time series and categories, making a direct comparison between the countries problematic. Some figures are based on wholesales while others describe consumption in 'real' weight, which of course makes it very important to underline the need for precautions. Due to these problems, the country statistics are presented in the appendix, and this chapter focuses on general differences and trends in the various countries.

2.1.1 STATISTICS FROM FOOD BALANCE SHEETS

In order to indicate the different levels of consumption in the six countries, we present some 2002-data from The Food Balance Sheets¹ as an introduction. We also include statistics from Hungary, as this country is to be included in the Welfare Quality project at a later stage.

¹ FAOSTAT data, 2004, <<http://faostat.fao.org/>>.

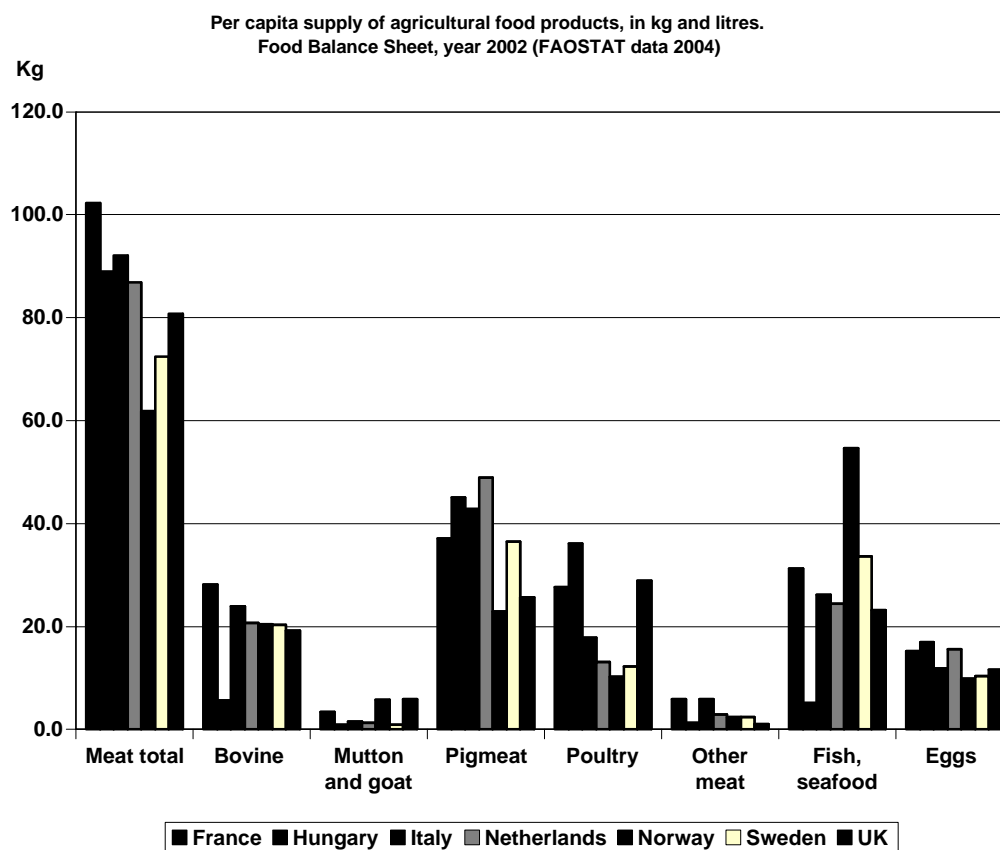


FIGURE 2.1 Per capita supply of agricultural food products (FAOSTAT data, 2004).

TABLE 2.1 Per capita supply of agricultural food, based on the Food Balance Sheets, year 2002 in kg and litres.

	Meat total	Bovine	Mutton, goat meat	Pork	Poultry	Other meat	Fish, seafood	Eggs	Dairy excl. butter
France	102.3	28.2	3.4	37.2	27.7	5.8	31.3	15.3	275.5
Hungary	88.9	5.6	0.9	45.1	36.1	1.2	5.1	17.0	180.6
Italy	92.1	24.0	1.5	42.9	17.9	5.9	26.2	11.8	255.9
Netherlands	86.8	20.8	1.2	49.0	13.1	2.8	24.5	15.6	345.7
Norway	61.9	20.5	5.7	23.0	10.2	2.4	54.7	9.8	275.1
Sweden	72.4	20.4	0.9	36.5	12.2	2.3	33.7	10.3	369.4
UK	80.7	19.2	5.9	25.7	28.9	1.0	23.2	11.6	230.9

Source: FAOSTAT data, 2004.

Figure 2.1 and Table 2.1 point to some very noticeable differences, such as:

- French total meat consumption per capita is very high (102.3 kg), whereas the Norwegian total of meat consumption is rather low (61.9kg);
- Hungarian consumption of beef is very low (5.6 kg), whereas their consumption of pork (45.1) and poultry (36.1) is quite high;
- the British and the Norwegians have the highest consumption of mutton and goat meat (5.9 kg and 5.7 kg);

- the French and the Italians have the highest consumption of other meats than those included in this report (5.8 kg and 5.9 kg), such as rabbit;
- Norwegian fish consumption (54.7 kg) is almost twice as high as in the other countries, and explains somewhat the low total of meat consumption.

These figures can give a direct indication of the differences in consumption levels, while the data below presented from the country reports focus on trends and changes over time and give some explanations.

2.1.2 STATISTICS FROM THE COUNTRY REVIEWS

Beef

Beef consumption decreased in Italy and France in 2000 and 2001, and then increased again from 2002. One main reason was the BSE crisis. In 2002 there was a significant increase in wholesales of beef both in Italy and France, but the comeback has not been sufficient to fully recover the overall purchase of beef. Compared to 1999, there has been a 10% decrease in this sector in Italy.

In the UK the consumption of beef and veal fell to a low of 12.7 kg/hd/yr in 1996, largely due to the BSE crisis. Since that time, consumption has increased again to around 17 kg/hd/yr.

Beef consumption in Sweden has increased significantly during the last ten years. Apart from the increase, it is also worth noting that meat consumption in Sweden didn't decrease during the BSE crises in the late 1990s, as it did elsewhere in Europe.

In Norway and the Netherlands the consumption of beef has not changed much during the last ten years – not even during the BSE crisis. These two countries are at approximately the same level of consumption regarding beef. In 2001 the Netherlands wholesales of beef per capita was 21.2 kg compared to 20.0 kg in Norway.

Pork

When the BSE crisis (2000–2001) caused a decrease in beef consumption in Italy, the consumption of pork and poultry experienced an opposite trend, representing a substitute for beef. Wholesales of pork meat in Italy were 27.3 kg per capita in 1994 and was up to 30.1 in 2001 during the crisis.

In France consumption of pork increased from 33 kg per capita in 1991 to 38 kg in 2000. During the last year of the BSE crisis, consumption fell to 36 kg per capita, but was already rising again in 2002 – up to 37.1 kg.

In Norway, wholesales of pork per capita have increased by 20% over the last 20 years and are up to 24.1 kg in 2003, but the figures have been rather stable since 1995. The food crises in other European countries do not seem to have had a great impact.

Sweden had its peak in consumption of pork prior to and during the BSE crisis in 1998-2000, when it reached 15.7 kg per capita. In 2002 the consumption of real meat was down to 14.4 kg. (These figures are somewhat unreliable according to the Swedish report.)

In the UK, consumption of pork and bacon seem to have stabilised around 20 kg per capita in total during the last decade. Also in the Netherlands the consumption of pork meat has stabilised during the last decade between 9.5 and 10 kg (real consumption).²

Mutton and lamb

In 2002, Italians re-approached beef. This determined, on the one hand, a substantial pick up of this sector and, on the other hand, an annual decrease in the consumption of all other types of meat. The overall effects of BSE in 1999-2000 can be seen in an increased appreciation for pork, rabbit and horse meat, as well as a decreased appreciation for poultry and mutton and lamb.

Wholesales of mutton and lamb have been at a rather constant level between 5 and 6 kg in Norway during the last 20 years. Mutton and lamb consumption in the UK appears also to have stabilised over the last 10 years at around 6 kg/hd/yr except from a low in 2001 due to Foot and Mouth Disease, but is now back up. (Figures from Sweden, France and the Netherlands are missing).

Poultry

In Italy wholesales of poultry per capita went up to 20.6 kg during the BSE crisis and had decreased again to 18.7 in 2003 – which is below the level prior to the crisis. This reflects the situation in many European countries. The recovery in beef consumption translated into a levelling out of poultry demand. In France there was a steady growth in consumption of poultry meat during the 1990s from 20.9 in 1991 to 24.8 in 1999. During 2000, the first year of the BSE crisis wholesales went up to 26.2, and has kept quite constant the following years.

In Norway wholesales of poultry have increased sharply from 4.6 kg per capita in 1989 to 11 kg in 2003, this rise in consumption can hardly be related to food crises as it has been a sturdy increase over the years. This development is also evident in Sweden where wholesales of poultry have doubled during the last decade from 7.7 kg per capita in 1994 to 13.8 in 2002. (The Swedish figures are somewhat unreliable according to the Swedish report).

² Defined in the Dutch report as 'the real consumption of meat, the weight of the carcass and other parts not used for consumption are not included in the figure (the figure would then be about twice as large). This is probably the reason that figures slightly differ in different sources'.

Consumption of poultry meat saw its greatest increase in the UK over the 1985 to 1996 period (by nearly 12 kg/hd/yr) and has increased by less than 2 kg/hd/yr since that time. Consumption of poultry meat appears to have reached a plateau around 29 kg per capita over the last 4–5 years. In the Netherlands there has been an increase in wholesales of poultry over the last ten years although not as big as in other countries. Starting at 8.6 kg per capita in 1990 reaching 11 kg in 2001.

Milk

Figures on the level of consumption of milk differs considerably between the countries according to the country reviews. They reveal a decline in wholesales of milk in all countries (UK figures missing). Consumption of milk is clearly lower in Italy and France than in the other countries. It's worth noticing that the wholesales of milk in Norway have declined by 30% from the 1970s and until 2001, leaving the Netherlands and Sweden at the top of the list.

TABLE 2.2 Wholesale of milk per capita, all countries in time-series.

	Netherlands	Italy	France	Sweden	Norway
1990	162	-	-	-	-
1991	-	-	78.5	-	-
1994	-	74.4	-	146.0	160.2
1995	157	76.8	-	144.7	156.0
1996	-	76.8	-	144.3	151.3
1997	-	-	-	143.9	145.7
1998	-	-	-	142.0	140.0
1999	153	65.9	-	140.8	132.3
2000	152	64.5	73	138.7	127.5
2001	146	-	-	139.5	122.5
2002	147	-	71	141.5	120.8

Note: Edited version of statistics from the different country reviews, UK figures missing.

The statistics from the Food Balance Sheets gave quite another picture, especially regarding France and Italy. This probably relates to different types of data and measuring levels. In the case of Italy and France, it might be related to consumption of and the measurement of cheese consumption.

Eggs

Wholesales of eggs in Norway increased until they peaked at almost 12 kg per capita a year during the 1980s, before decreasing and stabilising around 10.5 kg. The Swedish statistics also reveal changes, but with smaller margins. Swedish consumption of eggs in 1994 was 10.8 kg per capita with an increase to 11.1 kg in 1999, followed by a decrease down to 9.1 in 2002. (The Swedish figures are somewhat unreliable according to the Swedish report.)

In the UK, consumption of hen eggs fell substantially from 227 eggs per capita in 1980 to 165 eggs in 1989, but consumption has risen again slightly over the last two or three years and is expected to pass 200 again in 2003 statistics. Free-range eggs account for 15% or so of egg consumption in the UK, whilst barn/perchery eggs constitute around a further 5%. The majority of production and consumption is cage eggs.

In the Netherlands, consumption of eggs has been rather constant during the last decade, starting at 176 eggs per capita in 1990 ending at 184 eggs in 2002. This is also the trend in Italy and France. In Italy, wholesales per capita was 219 eggs in 1995 and 218 eggs in 2003. The difference in Italy is the peak to 227 eggs per capita during the BSE crises in 2001.

Fish

Norwegians' consumption of fish has increased in later years and is relatively high compared to other countries.

TABLE 2.3 Annual consumption of foods (wholesales level) in the Nordic countries, 1997, kg/hd/year.

	Denmark	Finland	Norway	Sweden
Milk excl. butter	226.0	341.6	270.0	339.0
Eggs	15.9	9.7	10.1	11.6
Fish, seafood	24.7	35.9	50.7	27.5
Fish, freshwater	2.6	8.5	11.9	3.1
Meat	97.4	65.2	58.7	67.9
Poultry meat	18.4	10.3	7.6	9.0

Source: Summary of Table 1-5, SIFO 7-2001.

Fish occurs more frequently as a main component on the Norwegian dinner menu than in the other Nordic countries. Also the use of the fish differs as minced and poached fish is common in Norway, while fried fish is more common in the other countries (SIFO 7-2001).

2.2 WHO IS THE POTENTIAL CONSUMER OF ANIMAL WELFARE FRIENDLY FOOD?

Overall 'everybody' cares about animal welfare, both in general and in relation to food production. One can also point to the fact that women tend to hold a 'softer' view than that of men. In addition, the young and the highly educated tend to be more engaged in animal welfare. In Sweden these variables define the 3–4% of vegetarians and among them animal welfare concerns is the most common reason for becoming a vegetarian. In Norway, studies have revealed that women are more concerned about their own meat

consumption than are men, and they also take more action in order to reduce it. Even in France and Italy women seem more concerned about animal welfare and are more ready to choose animal welfare friendly food – when made available. Italian men seem to have a more routinized and traditional food consumption pattern (2001).

In France, age is related to beef consumption, with a reduction in consumption as age increases. However, the youngest generations consume less than the previous generations of the same age.

In the UK, 66% claimed to have reduced their meat consumption of livestock products due to their concerns regarding treatment of animals in 2001. In Italy one third (of 60 interviews carried out in 2001) claimed to have reduced their meat consumption for animal welfare concerns. In Norway, 14% had reduced their meat consumption in 2000, which is a higher figure than the previous years, but very few claim that animal welfare concerns was the reason. Mainly health concerns are important.

Many attempts have been made in Italy towards defining the average consumer of organic food, with different outcomes. The profile in general includes: medium/high class, education and income levels, age between 25 and 50, living in urban area, single or families with 1–2 children. Three categories of people have been identified: politically/ideologically motivated consumers, health consumers, and the non-loyal consumers. In general the motivations for buying organic food are food quality, health and the environment. Animal welfare is not included in these descriptions.

The consumption of meat products is socially and culturally differentiated (profession, age, generations and gender are the principal dependent variables). Also, there are not one but several profiles of consumers. According to the French review, one should first retain a socio-cultural differentiation in the consumption of meat food in general and then a social differentiation according to the type of consumed meat. In France the higher social classes consume more than twice as much lamb than the working classes, which again consume more pork.

Between 1965 and 1991 in France, there was a decline in meat consumption for certain social groups according to meat categories. Until the mid-1960s, consumption of beef followed the social hierarchy with 17 kg per capita at the top of the social scale (executive), followed by the middle classes, the working classes, and finally the farmers with 11 kg per capita. From the 1970s onwards this ratio reversed, and there was a drastic fall in consumption in the upper classes in the 1980s, implying a consumption level lower than that of the working classes, which itself was slightly higher than that of the employees.

Taken together, there are indications of considerable shifts in meat consumption in recent year in all of the included countries. The changes vary between social groups, following quite complicated and sometimes surprising patterns. This is reflected even for vegetarianism.

According to the different country reports, motivations for vegetarian consumption are mainly health, animal rights and ethical/social/political issues. Animal welfare in the

food production chain is essential to some, and to this group a labelling scheme on animal welfare could have a great impact on everyday life. Argumentations for a vegetarian lifestyle are many, but the reports point especially to those related to ‘respect of animal life’ and ‘health’. The numbers of vegetarians in each country varies over time, as was the case in France during and after the ‘mad cow crisis’. During the mad cow crisis, they counted 6.1% of vegetarians (November 2001), but a year later, the number fell to 2.5%. The figures for the numbers of vegetarians vary considerably, depending on the definition of vegetarianism.³ The figures in Table 2.4 represent the most recent counting in the study countries.

TABLE 2.4 Number of vegetarians in the different countries.

Country	Vegetarians (%)
The Netherlands	4–5%
The UK	6–7%
Italy	5–7%
France (6% in 2001)	1–2%
Sweden	3–4%
Norway	1–2%

Source: Country reports.

The country reviews reveal that little research has been conducted explicitly on consumers’ relations to animal welfare; hence, much of the information is gathered from research on organic food and consumption. Consumers’ opinions and attitudes towards organic food and consumption are considered to be close to opinions and attitudes on animal welfare in food production, as this is usually an important element in organic agriculture. According to French research, consumers of organic food in general are more concerned about animal welfare than those who never buy any of these products.

Research related to organic food and consumption reveals that the public in general is quite positive towards the introduction of organic food. They claim that these products are preferable and desired, and that they are willing to pay extra for them. Consumers often consider organic products to be natural, healthy, tasty, authentic, of high quality and safe. Still, sales of organic food in several countries increase very slowly and this is often explained by poor product variety and high prices. In addition, Berg (SIFO 3-2001) points towards Norwegians perception of Norwegian food as almost-organic as an explanation of low interest in organic food.

³ The category of vegetarians may include strict vegans, lacto-ovo vegetarians, people who only eat certain types of meat, and even people who define themselves as vegetarians but eat meat on certain occasions.

2.3 PUBLIC OPINION AND ATTITUDES

The importance of animal welfare

In the French report, meat is described as the most positioned food at the symbolic level; in the West before the 1960s, meat was the more valued foodstuff in the culinary system (social distinction and special feeding virtues). It seems that there is a transformation of the representations around meat, due to the vulgarising of meat consumption by the progress of agriculture and industry (attenuation of its distinctive value) and by a swing of nutritional concerns (De Labarre, 2000).

In France the sensibility towards farming animals for human consumption seems to be a modern problem. It appears to be a polarization of the opinion, marked by a significant opposition between the executives superiors and profession liberals, who declare themselves 'concerned by the controversies in the breeding conditions', whereas the labourers claim to be 'not at all concerned'.

The welfare of farm animals has become an important issue for British consumers, producers and policy makers (Bennett, 1995). According to Hughes (1995) the British meat consumer is thought to be more animal welfare aware and concerned when compared with its European neighbours. Bennett and Blaney (2002) empirically showed that the vast majority of UK respondents are concerned about animal welfare and supported proposed legislation to phase out the use of battery cages for egg production within the EU.

Research undertaken in Italy agrees on the growing intolerance of cruel rearing conditions, and the consumer interest in organic meat and dairy products has grown during recent years, due to meat scares related to the BSE scandal. As a consequence, concerns about animal rights and animal welfare issues have grown. Despite a general perception concerning the removal from 'naturalness' or from 'tradition' in the relationship between animals and human diet, Italian consumers tend to preserve an unrealistic and romantic idea of the animal, with whom they have lost a direct contact. Nevertheless, Italian consumers are less concerned about animal welfare than consumers in northern Europe, as reported by Miele and Parisi (2001).

Animal welfare is considered an important issue by Dutch respondents, but it is rated as less important than food safety and sensory factors related to food products (Beekman, 2004). Another study though says that respondents see the relative importance as follows: food safety and the way animals are treated are seen as most important, with sustainable production and future existence of the sector taking the middle-position and prices taking the last position.

A majority of Norwegians (57%) believe that animal welfare should be considered to a greater extent, while 38% are content with the situation today. Although many seem to worry about animal welfare in food production, it doesn't seem to influence their

consumption of meat and fish to a great extent. It is suggested that price reductions and the central position of meat in Norwegian food culture explain to some extent why meat consumption has not declined. Norwegian costumers of farmers markets in Norway are especially interested in production conditions (NILF 17-2004).

A Swedish study looking at buying behaviour of food in general indicates that the Swedish consumers choose products primarily according to the following priority order: taste, keeping quality, health, price and ecologically produced, which includes animal welfare concerns (Magnusson et al., 2001).

While some opinions seem to be shared by people in all the study countries, there are also indications of distinctions along several dimensions, including, among other things, a north-south divide and differences between countries that have experienced severe food crises and erosion of consumer trust and countries that have not, as was indicated even by the consumption trends reported above.

Perceptions of production methods

In France, intensive breeding is seen like the symbol of intensive business practices, and are strongly rejected by the public. Bad feed given to animals, profit motivation, transport conditions, and accelerated production are denounced. This also seems to be the general picture in the other study countries.

On the acceptability of production methods, Italian consumers identified poultry as the most unacceptable, beef and veal as second most unacceptable, while lamb, pork and milk are generally considered acceptable (Miele and Parisi, 2001).

A survey reveals that Norwegians (80%) believe that sheep have the best welfare, and 70% believe that the cattle's welfare is good. Half of the respondents think that pigs have good welfare while only 20% believe chicken/hen welfare to be good (Feedback 2001). Regarding animals' living conditions and welfare in Norwegian farming, 68% wholly or partially agree that the conditions are generally good, while 19% disagree (MMI, 2002).

Willingness to pay as an expression of moral concerns

Bennett (1998) suggests that asking citizens about their willingness to pay to support animal welfare legislation is one way of measuring the value that people place on that legislation. Willingness to pay to measure the benefits of legislation should accurately reflect people's moral concerns and the values they place on policy measures designed to address them if the aim of farm animal welfare legislation is to address the moral concerns that people may have about human treatment of animals and the way that food is produced (Bennett et al., 2002). This is evidenced by the study showing a positive link between moral intensity and people's willingness to pay to address the issues as the respondents stated a higher willingness to pay for the higher moral intensity 'live animal export' issue than for the lower moral intensity cage egg issue (Bennett et al., 2002).

Italian research shows that more than 30% are willing to spend more than 10% above the current price to economically support the costs of an improvement in the animal welfare conditions (2001). Those who are not willing to do it represent slightly more than 20% of the sample (Weber, 2001).

A Swedish study, measuring the willingness to pay for different products, shows that the importance of animal welfare attributes varies between products and seems to be animal specific (Carlsson et al., 2004). However, the same study indicates that there is a substantial heterogeneity among consumers with respect to willingness to pay.

According to Norwegian research (Feedback, 2001) almost 90% claims to be willing to pay 'a little more' to get meat labelled as a animal welfare friendly product. Also free-range eggs cost 50% more than regular eggs, but 58% of all say they would not mind paying extra (MMI, 2002).

2.4 KNOWLEDGE AND INFORMATION

Dutch consumers have little knowledge of livestock farms, and the knowledge they do have about the actual practices of keeping animals is fragmented and vague (Beekman, 2004; Beekman et al., 2003; Te Velde et al., 2001). Furthermore, Dutch research shows that the perceptions consumers have of livestock industries are mainly negative. Respondents in one study, for example, think that animals hardly have any space and that economic interests are more important than the welfare of the animals (Te Velde et al., 2001). Other Dutch studies have concluded that most of the respondents think that animals have a pretty OK life. The authors did remark that respondents had more positive ideas about the life of cows than about the life of pigs or laying hens. Perceptions about living conditions of these animals tended to be more negative (Verhulst and Verzijden, 2003).

Norwegian consumer practices do not coincide with their evaluations and opinions, as their opinions don't affect the amount of meat/fish they consume. Secondly, many consumers have little knowledge on animal welfare and, thirdly, they are often misinformed. But there seems to be a strong correlation between the evaluation of animal welfare and three measures of practice: use of consumer power, omnivorous (eat all) or partial/strong vegetarian. When animal welfare is believed to be good, the more likely informants are to be omnivorous. And the worse the animal welfare is believed to be, the informants are more likely to be vegetarians and conscious of enforcing consumer power. Still, most informants are likely to eat some meat, even if they believe that the animal had poor living conditions (SIFO 10-2002). Many express uncertainty and lack of knowledge regarding the actual living conditions of animals. In general, these consumers lay responsibility of animal welfare with the 'experts' (FR 1-2003).

In Italy, 38% of the respondents declared that they choose products labelled as reared 'with higher animal welfare'. Most consumers cannot properly identify labels addressing the production methods, and they tend to indicate the product's attributes or characteristics that might imply higher animal welfare. The most frequent answers have been 'national' products: this is a broad category that encompasses all the products that have been identified as local, regional, national, etc.; therefore, 'origin' is used by consumers as a clue to higher animal welfare. The percentage of consumers that consider themselves informed about rearing practices is around 30% for each product. Italian consumers listed 'quality of animal feed' as main factor for the welfare of the animals. The second factor is 'the animal's access to the outside', and the third is 'amount of space the animal has to live in'. These are followed by 'the freedom to behave normally', 'conditions of transportation' and 'conditions of slaughtering'. This ranking has probably been affected by the impact of the information campaign on BSE (Miele and Parisi, 2001).

A majority of Swedish consumers say they are trying to choose products of which the quality in the production chain is high. However, a majority also stress that it is difficult to get knowledge about the quality in the production. Lack of knowledge about how the animals are reared is pointed out as one of the most important problems in one study (Hallström, 2004).

2.5 ANIMAL WELFARE CONCERNS

Concerns regarding personal consumption

In Italy, consumers rarely put animal welfare among their food concerns; they mostly refer to animal well-being because of the impact that the life of the animal can have on human health. The relationship between animals and health is reaffirmed in the consumer request for healthier and tastier products. (Miele and Parisi, 2001).

While 37% of the Norwegians had doubts regarding their own consumption of meat, only 18% stated that they had done something about it (SIFO 4-1998). In 2000 there was a small increase (from 9% to 14%) of people reducing their meat consumption compared to the 1997 figures. The main reason for reducing meat consumption in Norway in 2000 was health and nutrition considerations. Another reason was taste, but consideration for animal welfare was not specified by many as an important reason for eating less meat (SIFO 10-2001).

In the UK, 66% of the consumers said that they had reduced consumption of livestock products due to concerns about the treatment of animals (Harper and Henson 2001).

A French survey in 2003 (SOFRES)⁴ on consumers attitudes and confidence in meat, nearly 36% of the consumers declare having less confidence in beef than before, as opposed to 27% regarding other meats. In such a context of insecurity, consumers seem to adapt by modifying practices, such as reducing meat consumption, purchasing from the butcher, orientating consumption towards meat products perceived to be ‘synonyms of quality’ and ‘less risky’, finding substitute products i.e. organic products or, finally, by increased attention on labels. Labelling is believed to be an important field of action for the next years in France (Pichon, 2002). Another French survey led by INRA in 2002 on consumers’ concerns related to meat shows that the medical safety is most important, followed by taste, animal welfare, and the effects on the environment occupying the last position.⁵

Animal welfare concerns

Many studies in the UK undertaken over the last 10 years show that many consumers are concerned about animal welfare. As many as 85% are concerned that animals may be mistreated or suffer in the process of producing food (Bennett, 1997), and 41% are concerned about the way that animals are kept. The UK report further points to consumer concerns relating to intensive and factory farming of animals, such as confinement, live transport and feed – but little mentioning of slaughtering.

Consumers in the Netherlands think about animal welfare in broad terms. It is related to the health of animals and the surroundings in which they live. Research shows that Dutch people think that animal welfare consists of an animal having enough space, outside possibilities, good food, and the possibility to express natural behaviour (Te Velde et al., 2001; MarketResponse, 2003; Verhue and Verzijden, 2003; Beekman et al., 2003; Beekman, 2004). Consumers do not have more detailed ideas of animal welfare.

When Swedish consumers have been asked about what they think is most important to expect from organic farmers, the following claims got the highest scores according to one study (Szatek, 2001): i) that animals are not stressed in relation to the slaughtering process, ii) that GMOs are not used, and iii) that animals have the chance to behave in a natural way. GM food and animal welfare concerns were in another study found to be of more central importance than price (Magnusson & Koivisto Hursti, 2004).

In Italy there is a consolidated trend of intolerance about the rearing, transport and slaughtering conditions of animals. Also there is a worry that a low level of animal welfare regarding living conditions could mean poor health and low quality of food – which again would mean a potential problem to people’s health.

As many as 36% of the Norwegian population claims that they will not buy eggs from battery hens, and an additional 25% doubts that they would buy it due to concerns regarding production conditions. This scepticism is most common among women.

⁴ Taylor Nelson SOFRES, Avril 2003, Les Français et la sécurité des produits alimentaires, La lettre du panel, Paris.

⁵ Résultats de l’enquête INRA 2002 auprès de 1000 individus.

The human/animal relation

According to the French literature review we must recognize an animal as edible prior to being able to eat it. There is a certain positioning within the system which classifies the animal species and the relations they have with humans. The symbolism of the animal's inherent nature which defines its proximity to humans, contributes to the decision as to whether to include or exclude the particular animal in the edible category. For Leach, it's the relation which is established between humans and animals that determines the animal's capacity to be considered as edible food. Leach arranges animals in four categories according to the distance which separates them from man. We can distinguish the categories 'wild', 'game', 'domesticated', and 'pets'. The two middle categories, game and domesticated, describe an animal as edible. The first and last category are fraught with prohibitions because they are either too far away or too close to humanity. Nevertheless, the borderline between the various categories differ depending on the culture (Leach, 1980, pp. 263–97). Poulain also points to Vialles' suggestion to look at two significant aspects, which she calls 'zoophagic' and 'sarcophagic'. For the zoophagic consumer, the animal doesn't pose any particular problem because the place of humans in the order of living things and the animal species is at the summit of creation. Either the animal is considered to have another nature, for example a divine trait, as we can see in the attainment of the complex process of classifying all living creatures. In any case, there is a clear distinction between animality and humanity. For the 'sarcophage', meat can only be conceived as edible if the origin of the flesh is hidden and where the very 'animality' of the animal is diminished or has completely disappeared. Examples of this would be the renaming of animals after slaughtering: from sheep to mutton, from calves to veal, from pig to pork.

One of the larger studies in Norway which focus on people's relation to animals and consumption of meat was conducted by Guzmán and Kjærnes (SIFO 6-1998). They describe two different approaches to the relation between humans and animals held by the informants. First, the scientific approach – in which animals and humans are both organisms that work in the same way, the focus lies on the effects that different types of food are claimed by experts to have on their body and health. Second, the humanistic approach – in which animals are seen as beings with mental abilities and needs. This implies that animals are seen as 'almost-subjects' or as resembling humans. The biological and mental resemblance that is established between humans and animals in turn has consequences for the informants' attitudes towards meat. The informants assume that animals that eat hormones or pesticides will be affected, and if humans eat these animals it will also influence their bodies. For some, this health risk serves as a reason for reducing meat consumption or vegetarianism. The humanistic approach is central when informants criticise modern meat production. Their ethical concerns are related to animals being treated as objects and becoming de-animalised (SIFO 6-1998).

Guzmán (2003) finds that the definition of animals varies between different groups. The producers draw mainly upon scientific understandings, and consider primarily animal health. The consumers' definition of animals draws upon both a scientific and a humanistic understanding of animals, giving the animals status as almost-subjects. They are to be treated well but can be eaten. The animal rights advocates draw mainly on the humanistic understanding and claim that the animals have individual rights and should

not be slaughtered and eaten (Guzmán 2003). Guzmán argues that there is an ongoing battle of the hegemony of definition of animal welfare, and Figure 2.2 is presented to illustrate the different positions.

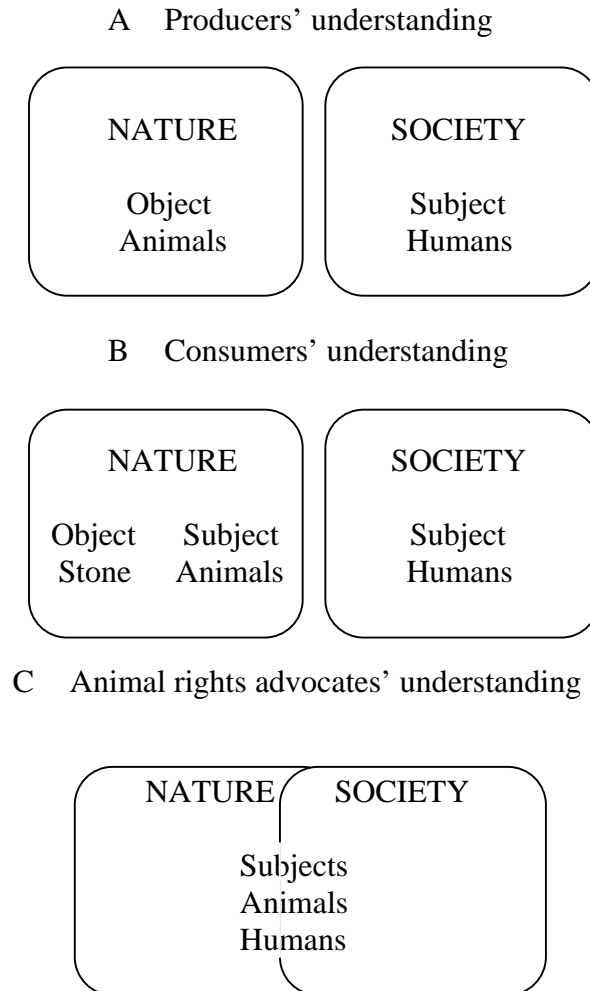


FIGURE 2.2 Interpretations of animal welfare

The problem of killing

The French literature review discusses the problem of killing animals. The eating of animal flesh presupposes that the animal must first be killed and this can't take place without taking some preliminary symbolic precautions. Societies manage the killing of animals for food through different processes of construction of the human/animal relation. In order to understand the process of legitimising the killing animals for food, one must take into account the mythic and religious domains. In hunting societies there are numerous examples where prayer or even excuses are addressed to the soul or the spirit of the animal. In pastoral or agricultural/breeding societies, the domestic animal is often used with divine authorization, e.g. kosher and halal meat. The authorisation to kill is accompanied by a complex categorization of the order of what is edible with a

series of food prohibitions. The function of the rituals related to the killing is to 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. All of the symbolic gestures help to better manage the relations between humans and nature in the vegetable/animal domains and define humanity's place in the order of living things (Poulain, 2002).

According to the French review, that the killing of animals for food in modern Western societies is performed under the non-religious or lay domain, is due to Christian influence. Here we can identify a process of 'thingification' which tends to de-animalize the animal destined to be eaten. This is characterized by a 'Taylorisation' and a 'scientification' of the raising and slaughter conditions. Animals are reduced to objects. 'In the food business, the animal has become an object or rather less than an object: just stuff' (Fischler, 1997, 133). Modern slaughtering allows a 'disassociation between the spurting of blood and it being put to death' by rendering the responsibility for the killing less certain by spreading out the tasks involved (Vialles, 1987). Nevertheless, these systems can be put in doubt by the progress of new information and knowledge.

2.6 DISTRIBUTION OF RESPONSIBILITY AND TRUST

Trust in farmers

The Norwegians trust Norwegian farmers to be well-informed regarding animal care taking. Eight per cent agrees, totally or partly, with the statement that farmers are knowledgeable, and men have greater faith in farmers than women. Forty-five per cent of the consumers trust Norwegian farmers' production methods to a greater extent than they do others. On the other hand, 42% don't believe there are many differences between Norwegian and foreign farmers' ethical standards in food production (MMI, 2003). The majority (73%) of Norwegian consumers feel that information about country-of-origin is important, and many informants assume that all meat sold in Norway is produced in Norway (SIFO 3-1999).

Even the Dutch think that farmers take good care of their animals; one study shows that 69% think so, but at the same time 63% of the respondents think that farmers have more interest in economics than in the welfare of their animals (MarketResponse, 2003).

In absence of other methods, Italians see the origin of production as a strong signifier of quality. A recent survey, carried out by ISPO, showed that consumers think that the origin of raw material should be indicated on the label (74%). Consumers prefer meat which comes from Italy. In fact, some consumers have noticed that they have given more weight to product origin since the BSE problem.

In Sweden, at least 70% of the consumers say it is very important that food is produced in Sweden, and one of the reasons mentioned is animal welfare concerns (Szatek, 2003). However, the gap in trust between Swedish and foreign products has decreased between 2000 and 2002.

Division of responsibility and trust

Norwegian consumers expect the authorities to take responsibility of animal welfare in general in Norway. Even so, Norwegian consumers don't seem to have the same belief in the governmental supervision of animal welfare as they do in farmers. Only 40% are satisfied with this supervision and only 31% agree that the government uses enough money to ensure animal welfare (MMI, 2002). An MMI survey (2003) also reveals that Norwegians believe that animal welfare is better taken care of in Norway than in other countries. But this is a decreasing tendency, 70% held this belief in 1999 compared to 58% in 2003. Regarding trust in information, 91% trust information given by the Food Safety Authority and 85% trust the Ministry of Health and other public organisations, while only 40% states that they would trust information on food safety given by the producers and 28% would trust the retailers. Eighty-five per cent of those participating in the survey request more public information on food safety (MMI, 2003).⁶ The Norwegian consumers also placed trust in the Norwegian meat industry in 2001, although less than in 1997. The majority trusted the industry to: i) deliver non-infectious meat, ii) deliver food of high hygienic standard, and iii) deliver meat from animals treated well while alive (SIFO 5-2001).

High levels of trust in Swedish authorities concerning inspection and control of the production of meat products have been recorded. According to one study, Swedish authorities are trusted more than European authorities or control measures set up by the private food industry (Edlund et al., 2003). This is hardly surprising, considering the Swedes perceptions and expectations of government authorities in general. This might indicate that people consider animal welfare to be an issue for the state and not a problem for them as individuals. On the other hand, a growing number of people seem to choose products and producers on the basis of attitudes and values that concern issues of ethical or political assessment and family well-being. Animal welfare issues are then one of the questions taken into consideration.

A 1995 UK Gallup poll showed that 71% of consumers considered that retailers have a responsibility to animals: 60% said that it is very important for the food industry to make sure animals are treated humanely, and 59% felt that it is very important that retailers support products which do not cause undue harm to wildlife (CWS Retail, 1995). There are important ethical considerations surrounding policies intended to improve the welfare of farm animals, not solely related to animal welfare and human responsibilities, but also concerning food quality (and safety), consumer choice and the distributional effects of policy (Bennett, 1997).

⁶ <http://www.mattilsynet.no/portal/page?_pageid=34,31801&_dad=portal92&_schema=PORTAL92&articleId=11226&artSectionId=213>.

The Dutch are not satisfied with government policy in relation to animal welfare. Sixty-five per cent of them think that welfare measurements are very low (MarketResponse, 2003). Beekman (2004) concluded that farmers tended to be more trusted than governments, which in turn were more trusted than supermarkets. The Dutch appeared to trust farmers with regard to animal welfare issues and rate them as accountable and knowledgeable. Quantitative research done by MarketResponse (2003) concluded that the respondents had about the same amount of trust in farmers, supermarkets and the government, while another study (Verhue and Verzijden, 2003) claims that the government is seen as responsible for animal welfare. Consumers hardly see themselves as responsible and supermarkets are mentioned even less. Some studies indicate that consumers think that farmers themselves are responsible for the welfare of their animals.

Regarding trust and animal welfare in Italy, social movements, such as animal welfare organisations and environmental movements, are considered more reliable, while the government is seen as neglecting this issue. Consumers or consumers organisation are considered more than any other to be able to promote the development of more animal friendly methods of production. The ranking list from the top down is: consumer organizations, friends/family, environmental organisations, scientists, animal welfare organisations, farmers' organisations, supermarkets, food industry and, finally, the government. A small majority of the Italian consumers seems to believe that consumers' choice does not affect the welfare of farm animals, while one third of the respondents cannot express an opinion on such matters (answers 'do not know' and 'neither agree or disagree'). Quite remarkably, more consumers seem to believe that they can improve the standard of animal welfare by not buying meat, more so than by choosing products with labels addressing the higher animal welfare standard of the method of production (Miele and Parisi, 2001).

3

INSTITUTIONAL CONTEXT

3.1 MARKET STRUCTURE

This section is mainly based on notes from the presentation Jonathan Murdoch held during a Welfare Quality meeting.⁷ Murdoch presented summaries from Sub Project 1, Work Package 2 on 'Retailers and the market'. For further analysis of the market we direct readers to Part II of this report.

The retail structures and retail contexts in the six study countries is very varied, such as differing relationships between retailers and suppliers (e.g. Norway and UK). Also there is a variety of different supply chain management approaches and uses of labels and assurance schemes. In addition, the political contexts differ between the countries, e.g. in Sweden the public assumes that state authorities ensure animal welfare while in the UK this is seen more and more as a retailer function. Some common trends across the study countries can still be found, such as: growing concentration, albeit at varying speeds; growing use of retailer private labels; and growing strength of retailers in the supply chain. Thus, responsibility for animal welfare implementation appears to be shifting to retailers.

Main characteristics of the Norwegian market

In Norway retailing is highly horizontally concentrated, as four groups account for 82% of total grocery market. The four groups are: ICA Norge AS (23.6%), Norgesgruppen AS (34.7%), Coop Norge (23.7%) and Reitangruppan (17.4%). The stores are predominantly soft discount stores with restricted product lines and a low degree of consumer differentiation. The retailers mainly sell Norwegian produce.

Despite this strong horizontal integration in Norway, the vertical integration is weak, with sharp limits to retail power. The retailers' limited power is an intended effect of strong agricultural policy (high tariffs). The Norwegian retailers are thus stuck with Norwegian suppliers. The market share for retailers' private labels is very low (8%), with almost no food products. Retailers have little competence on food safety and quality, and hence rely heavily on suppliers and public authorities.

⁷ Welfare Quality 1st Integrational Meeting, Leuven, 28 August 2004.

The Norwegian agricultural policy 'shield' deters foreign retailers from bringing their own lines of fresh meat and milk products into the Norwegian market. This also reflects the strength of farmers and farmer co-ops, which effectively control their markets in milk, meat and poultry/eggs. In Norway, farmer co-ops' branded goods hold monopolistic market shares in these sectors (dairy co-op holds 93% of fresh milk market, meat co-op holds 70% of wholesale market, poultry co-op holds 70% of poultry/eggs market. In addition, farmer co-op brands are most trusted among consumers.

Main characteristics of the Swedish market

Swedish food retailing is also dominated by three major organisations: ICA, Coop and Axfood together control around 95% of market. ICA (48%) is a retailer-run federation of individually owned stores, but is becoming a more traditional chain. Coop (23%) is a consumer co-op, but is becoming increasingly centralised. Whereas Axfood (23%) contains both centrally run chains and retail federations.

Swedish food retailing can be characterised as market driven rather than market driving, and as reactive rather than proactive. The retailers have long seen themselves as sellers of supplies branded products, whether from farmers' federations or from international companies. The retail concentration gives them some power and leverage over suppliers, and this has increased since Sweden joined EU in 1995. Also the retailers can choose amongst suppliers putting increased pressure on domestic suppliers, and the retailers are now starting to act more strategically.

Branding is becoming important for Swedish food retailers, focus on price competition has gotten strong (hard discount). All of this takes place in a context where consumers expect state institutions (rather than retailers) to ensure safety of goods for sale. While animal welfare is an issue that should be communicated through and by the state, retailers are beginning to communicate their own animal welfare strategies to consumers. Also assurance schemes, such as Swedish Seal and KRAV, play on consumer trust in Swedish agriculture and its high assumed welfare standards. Retailers such as Coop use KRAV to certify eggs, and ICA is also using free range eggs for its own label products.

Main characteristics of the Dutch market

Within the traditional retail sector in the Netherlands, about 75% of total food sales take place in supermarkets. The largest players are Ahold, Laurus, Aldi and C100. In the more specialist end of the sector, Nature Shops account for 40% of organic sales. There is a fierce competition between the main retailers, regarding level of service and price, with high service retailers going for image of high quality products (Ahold, Albert Heijn) while others go simply for price (Aldi, Lidl). However, since the end of 2003 all supermarkets have been involved in a price war.

The majority of products in the Netherlands pass through a small number of buying desks (7 in the Netherlands). A great deal of power thus lies with retailers – in order to reach the consumers, suppliers and manufacturers often have to pay ‘slotting allowances’ for shelf space. There is a growth of own-label products in supermarkets, and some use of labelling to indicate environmental (organic) and social attributes of the products. But labels based on animal welfare characteristics are not extensive (little comparability between labels).

Main characteristics of the UK market

In the UK food sales are dominated by four retailers (Tesco, Asda [Walmart], Sainsbury and Morrisons/Safeway). Tesco now has 691 stores, Sainsbury’s 453, Asda 240 and Morrisons 580. The small and independent shops have seen their market share slip from 50% in the 1960s to under 15% by the late 1990s. Nevertheless, there is some independent presence, e.g. in meat sales: Tesco 21%, Asda 14%, Sainsbury 14%, Morrisons 15%, butchers 16%.

The level of concentration in the UK means that a small number of buying desks link 233,000 UK farmers to places where consumers purchase 80% of their groceries. The fragmented nature of the farming industry (e.g. no tradition of strong co-ops) means that farmers are in a weak bargaining position. Surveys show that UK farmers receive only a small percentage of final retail price (e.g. beef 26%, lamb 49%, pork 20%, chicken 21% and milk 25% – source, NFU) In line with a Competition Commission report, a voluntary code of practice for supermarket/supplier relations was introduced in 2000.

In the UK there is fierce competition between retailers on both price and quality, and a widespread use of own brands (up to 50% of goods in some leading chains). Highly sophisticated supply chain management techniques are used to ensure traceability on products, especially own brand products. In addition other assurance schemes are used. Thus, ‘retailers ... can specifically reward farmers who invest in standards of animal welfare that exceed the acceptable norm’ (Defra, 2004a). The leading UK supermarkets on animal welfare issues are Waitrose and Marks and Spencer (e.g. M&S using only free-range eggs).

UK retailer strategies have led to a significant amount of product differentiation and market segmentation: different products to suit different tastes e.g. consumers offered beef products that range from extra lean mince for health conscious consumers to premium Aberdeen Angus for quality conscious to low price meat. The increasing diversity in products, the variations in traceability and assurance schemes as well as the differing modes of regulation mean that animal welfare is distributed across a host of differing market arrangements, but major retailers are undoubtedly in a dominant position in the UK.

Main characteristics of the Italian market

The Italian retail structure is still very fragmented in comparison with other EU countries, mainly due to legislation that has protected small businesses from competition from large organisations and strong regional/local identities. In terms of share of distribution, supermarkets account for around 40% of sales with around 16% in specialist shops. The most significant distribution channels are Esselunga, Conad, Coop, Gruppo GS (Carrefour), Rinscente-Auchan, Despar.

Esselunga uses a wide range of own-brand products including some animal welfare characteristics (e.g. Esselunga Naturama Eggs, in which hens are raised in outdoor system). Coop also uses a number of labels to indicate ecological and animal welfare characteristics of products (e.g. the BIO line) and has a particular commitment to free range and to dolphin-friendly products. The Auchan-Rinascente group has commitments to cooked ham supply lines that enshrine welfare characteristics (spacious housing, ventilation, transport, etc).

Main characteristics of the French market

Traditionally, the French retail sector has had much in common with the Italian sector. However, there has been a decline in smaller specialist food outlets (the total number of grocery shops has declined from 87,600 in 1966 to 19,800 in 1998; the total number of butchers from 50,500 to 14,000 in the same period), and the number of hypermarkets has grown from 114 in 1970 to 1,172 in 2000; the number of supermarkets has grown from 1,453 to 8,389 in same period. In line with these trends, over 66% of food is now purchased in hyper/supermarkets with only around 16% purchased in specialist food outlets. Around 70% of fresh meat is sold to consumers is in hyper/supermarkets. However, butchers still account for 23.4% of such sales, and there is a strong regional/geographical distinctions in the retail sector (e.g. young beef meat in the east, organic meat in the west). There has been a growth of labelling schemes of many differing kinds in France, e.g. geographical labels (AOC), organic labels, assurance scheme labels (CCP, VBF), retailer labels. Each has different implications for animal welfare.

Conclusion

There is considerable variation between the study countries. The retail structure is very varied, and there are different relationships between retailers and suppliers in the countries. It is evident that the power lies in different places in the structure, which indicates that complexity is higher than anticipated. There is a growing concentration in all countries, but at varying speeds. Also we see a growing use of retailers, and that the responsibility for animal welfare is moving towards the retailers. Murdoch draws up a simple figure to visualize how the different countries are placed along two axis: concentration vs. fragmentation and open structure vs. closed structure (see Figure 3.2).⁸

⁸ From minutes of the Welfare Quality integration meeting in Leuven, 28 August 2004, by Emma Roe.

It will be interesting to see how this structure is reflected on the consumer side. And, how does the consumer fits into the matrix? Is animal welfare the consumers' responsibility? Can the market structure and retailer system tell us something about the consumer role? Do the consumers consider the importance of animal welfare according to other aspects?

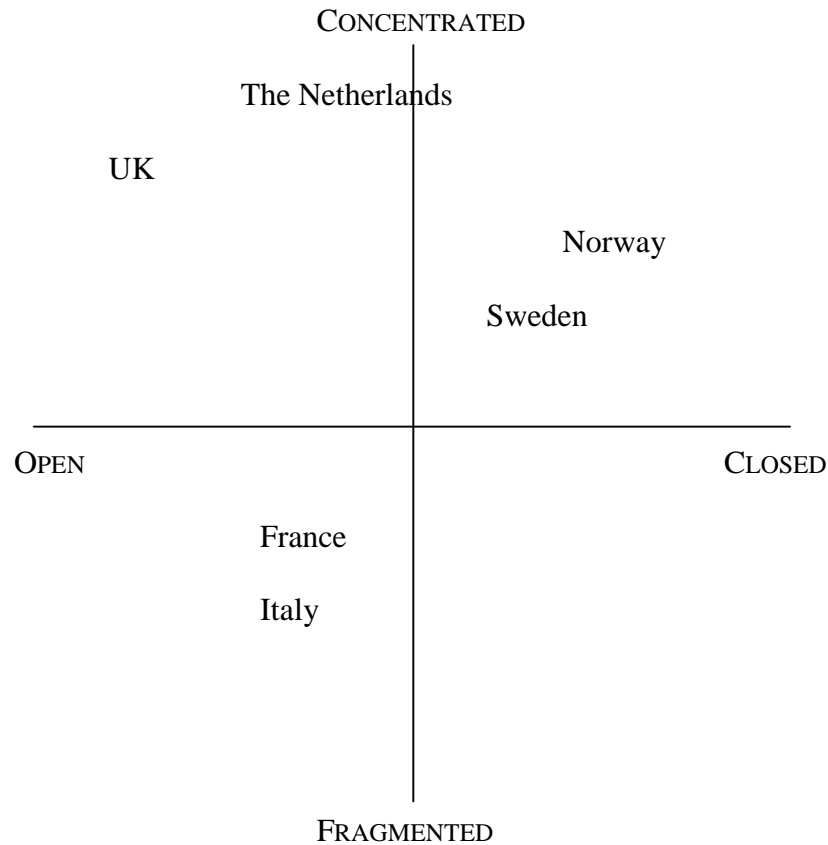


FIGURE 3.2 Mapping retail structures according to four criteria
 Source: Jonathan Murdoch, August 2004.

3.2 LABELLING SCHEMES

There are no specific labels ensuring animal welfare in production conditions in Norway, Sweden, Italy and France yet, whereas the UK has Freedom Foods and the Netherlands have some variations of such. The participating countries have labels regarding organic production and regarding quality, safety and taste. Work Package 1.3 has classified the variety of labels into four generic types (information which also is provided regarding the specific labels in the literature reviews):

- (a) conventional schemes in which animal welfare plays only a small part;
- (b) other schemes in which animal welfare is more important;
- (c) schemes in which animal welfare is of primary importance e.g. Freedom foods;
- (d) organic schemes (which might also have a welfare component).

Sweden and Norway have very few food labels contrary to the other countries, in which the variety of labels seem to confuse the consumers – both regarding what they promise and regarding who's behind the labels and whether they are trustworthy.

UK

In the UK the Freedom Food Scheme was launched by the RSPCA based on the concept of the five freedoms⁹ as defined by FAWC. This scheme uses science based animal welfare criteria as much as possible to raise standards of animal welfare on the farm, in transit and at the abattoir (Schroder and McEachern, 2004). There are other schemes such as the Farm Assured British and Lamb Scheme, the Minced Beef Quality Mark and the British Farm Standard Mark in the form of a red tractor, introduced in 1992, 1996 and 2000 respectively. These schemes serve as a communication channel, aiming at guaranteeing for the consumer the quality and traceability of meat and meat products from source to consumers (Turner and Taylor, 1998).

The Netherlands

Most labels in the Netherlands are related to the agricultural sector and deal with organic or social requirements. Labels solely based on animal welfare components are not extensive, and mainly occur on eggs and some meat products. The use of safety labels is more widespread. Two different types of safety labels/certifications can be distinguished: consumer-oriented labels (CPE) and business-to-business labels (HACCP, Eurep-Gap). Retailers in general seem somewhat reluctant towards labels that imply better quality or sustainable production. The retailers try to make sure that consumers trust the products they buy in their store, including unbranded or private brand products.

France

At the moment, few labels exist in the field of animal welfare in France. The question is also whether French consumers really want to have information which will bring them closer to the animal conditions of living, growing and being killed? Information on labels points to medical (production, slaughtering) but also consumption (nutritional, geographic) and cultural (halal, kosher) 'know-how'. Animal welfare is not present.

⁹ Freedom from hunger and thirst.
 Freedom from discomfort.
 Freedom from pain, injury and disease.
 Freedom to express normal behaviour.
 Freedom from fear and distress.

Sweden

Apart from the legal requirements, there are voluntary assurance schemes as well as organic standards which include animal welfare measures in Sweden. The most important of these, from a consumer perspective, is the KRAV label. Animal welfare concerns are an important aspect of the standards related to the KRAV label, but this is mainly an organic label. More general requirements for products labelled by KRAV are concerned with procedures for slaughtering, transports and fodder.

Norway

Food labelling has been brought up for discussion in Norway but no such labels exist as yet. In a report from the Ministry of Agriculture to the Storting,¹⁰ it is recommended that the Ministry prepares a labelling system that producers and retailers are responsible for implementing. Certain standards of animal welfare are demanded in order to use the organic Ø-label, and products must be produced according to Regulations of production and labelling of organic agricultural goods. Still, it is not common to market organic meat as especially relevant from an animal welfare perspective in Norway, but one egg marketing company (Nordgården) does so under the slogan 'Taking animal welfare seriously'.

Italy

In Italy the existing labels do not specifically refer to animal welfare. At the most, they refer to the type of animal husbandry (outdoor, extensive, etc.). Considering that there are no legal definitions, except in a few cases, those terms can, however, be used in an inappropriate/variable manner. Moreover, few campaigns exist to provide consumers with specific information, apart from the material posted on Internet by some producers and distributors. This situation obviously creates confusion among consumers, who often do not even know the exact meaning of the different rearing typologies. Moreover, the brands used are mostly of production or distribution firms that refer to their own productive protocols – that is, those designed specifically for their own production. As a result, every brand has its own peculiar features, with different types of indicators, which increases the confusion among consumers.

Consumers' thoughts on labelling

Swedish consumers are not very likely to choose animal products with animal welfare concerns in mind. The major organic label, KRAV, which includes animal welfare standards, is well known. The awareness though, that animal welfare concerns actually are included, is low; in general, people have a vague notion that animals on farms approved by KRAV are treated better.

¹⁰ St.meld. nr. 12, 2002-2003 – Om dyrehold og dyrevelferd.

On the one hand, the majority of Italian consumers declare that they do not trust labels, and that this lack of trust prevents them from buying animal friendly produced foods. Most consumers believe that these products are not available in shops. But, at the same time, the majority of the consumers believe that animal friendly produced products are 'easily available to them'. A possible explanation of these contradictory data is that a large part of consumers cannot identify exactly what animal friendly produced products mean and most people believe that products bought 'at the farm gate', as well as meats from the 'local butcher', are different from foods available in conventional stores (Miele and Parisi, 2001).

Results from Norwegian (SIFO 3-1999) focus groups indicate that consumers primarily want information about country-of-origin. Animals' life histories, the farmers' names and the farming district do not carry the same interest. Still, identifying the animals' sex, the farm and the district might be considered interesting if related to taste. Some also believe this kind of information might have a confidence-building effect. On the other hand, the consumers are reluctant to comprehensive information on the animals' lives, name, picture etc. on the meat packages, and seem to find it a disturbing and unpleasant reminder of the fact that meat comes from living animals. According to a Norwegian study, 45% claim that they 'quite certainly' would prefer meat labelled animal welfare friendly and 26% claim that they 'most likely' would buy such meat – if given the choice (Feedback, 2001).

Regarding labelling of animal welfare in production conditions, the majority in Norwegian food policy consumer panels are quite clear that this kind of information does not belong on food packages (FR 1-2003). They will rather have a guarantee that the animals have been treated well than having to consider this aspect when buying food, as they don't believe that ordinary people know enough about this to make informed choices. The consumers fear that information on animal welfare in food production on packages will confuse them and make it harder to choose. The participants on the panels conclude that it would be better if the government tightened the regulations further in order to secure animal welfare, rather than making it the responsibility of every consumer. The consumers who are positive about such labelling are also the ones most devoted to animal welfare.

Contrary to these Norwegian results, results of the UK Food Standard Agency's 'Better Food Labelling Initiative' – a survey of food consumers published in July 2000 – showed that most of the respondents ranked highly products with improved labelling related to animal welfare. The majority wanted to be able to support those foods that were produced humanely and considered it essential that information about the method of rearing and the production system should be given on the label (FAWC, 2001). Indeed, labelling is the standard prescription for dealing with different qualities and permits consumer choice at the same time (Blandford and Fulponi, 1999).

The different country reports give detailed information on many of the existing labels (such as owner of labels, requirements and consumer knowledge and recognition). Part II will further elaborate on the labelling schemes related to the retailers. A large variety of food quality, tractability and animal welfare schemes will be presented in Part III.

3.3 SUMMARY OF THE REGULATORY FRAMEWORK

Sweden

Swedes in general trust the government authorities and agencies. And, in addition, the Swedish citizens expect the authorities to take care of many of the problems discussed in Swedish society. But there are important ongoing changes in the political culture today. When Swedish consumers buy a product in a supermarket they expect it to be 'safe' or 'not harmful', otherwise the product wouldn't be allowed to be sold. The Ministry of Agriculture's goal is to enhance the protection of animals, to strengthen the position and influence of consumers in the market, and to reach sustainable production of food considering ecological, economical and social aspects. Subordinate to the Ministry of Agriculture there is a large number of government agencies and authorities with the responsibility to implement the government policy. From the perspective of the consumer there are three important central government agencies. The first is The Swedish Consumer Agency (Konsumentverket),¹¹ the second the National Food Administration (Livsmedelsverket),¹² which is the central supervisory authority for matters relating to food, including drinking-water. The National Food Administration has the task of protecting consumer interests by working for safe food of good quality, fair practices in the food trade, and healthy eating habits. This includes issues of labelling as regards, for example, the composition, weight, keeping qualities and origin of the food. Thirdly, there is The National Board for Consumer Complaints (Allmänna reklamationsnämnden).¹³ The main Swedish legislation concerning animal protection is the 'Animal Protection Act' from 1988. The law has been updated several times, most recently in 2003 when the 'Animal Welfare Agency' was established.

Norway

'The Ministry of Agriculture is responsible for food and agricultural policymaking. The food policy aims to provide consumers with wholesome, high quality food products and to ensure that the food production process is carried out with environmental, public health and animal welfare concerns in mind'.¹⁴ Animal Welfare is regulated by the Animal Protection Act¹⁵ (currently under revision), and by many regulations concerning specific areas and animals founded in this act. Essential in act is §2, stating that animals are to be treated well and considerations regarding the animals instincts and natural needs are to be taken in order to prevent unnecessary pain. The Norwegian Food Safety Authority implements and enforces many of the regulations connected to the animal protection act. They are responsible for securing healthy and safe food and safe drinking water. They promote human, plant, fish and animal health, environment-friendly

¹¹ <<http://www.konsumentverket.se>>.

¹² <<http://www.slv.se>>.

¹³ <<http://www.arn.se>>.

¹⁴ <<http://www.odin.dep.no/ld/engelsk/bn.html>>.

¹⁵ Lov om Dyrevern, LOV-1974-12-20 nr.73.

production, and ethically acceptable farming of animals and fish. They also implement and enforce legislation of the act relating to food safety and plant and animal health, and the act relating to the welfare of animals.

UK

Legislation has been the main tool to institutionally impose welfare standards to protect/improve the welfare of farm animals in the UK (Bennett, 1997). There is a variety of such legislation both in the UK and the EU (see EUROPA, 2004). Bennett (1997) suggests that the best policy approach would be to combine legislation with subsidy payments because legislation could provide a baseline and subsidy payments provide incentives to further improve the welfare of farm animals. The Governments of England and Wales are soon to introduce a new Animal Welfare Bill and the Government of Scotland a new Animal Health and Welfare Bill which will go beyond current legal requirements to protect the welfare of animals and require a duty of care on the part of animal owners/keepers not just to avoid cruelty but to provide for the welfare needs of animals (be they kept for food or companionship). The welfare criteria in farm assurance schemes relate to the broad areas of animal husbandry, housing, environment, space allowance, health and nutrition, management and stockmanship, transport, slaughter and mutilations (FAWC, 2001). Their starting hypothesis is that farm assurance schemes represent a voluntary private sector/market based framework for ensuring the application of animal welfare standards. So assurance is viewed as a formal guarantee offered by the suppliers to give the consumer confidence regarding the provenance of the livestock product covered by that assurance (FAWC, 2001).

The Netherlands

At the Ministry of Agriculture, Nature and Food Quality, together with several committees, the government policy is determined. In Dutch politics there is a strong tendency to strive for consensus. This means that institutes and organisations with different interests and opinions are often invited to participate in the bargaining process. The Dutch Organisation for the Protection of Animals, for example, is frequently asked to give its opinion on certain subject, or to join meetings. Most of the time, the government strives for a balanced representation of opinions. So, when animal welfare organisations are invited to participate in a meeting, organisations that represent interests or opinions of the livestock industry are also invited. A problem is that there are no clear rules, though, about whom to invite when. The most important law relating to the welfare of husbandry animals is the Health and Welfare Law for Animals (Gezondheids- en welzijnswet voor dieren).¹⁶ The law is based upon the recognition of the intrinsic value of animals. It is important that it is recognised in Dutch government policy nowadays that the welfare of animals should be protected because of the animal itself. It means that it is recognised that humans have to take into account the welfare of animals because of an interest of the animal itself. This suggests that animal welfare is

¹⁶ Except article 36 of the law, that states that cruel treatment of animals is prohibited, which applies to the treatment of all animals, and not only to husbandry animals. This article also states that everyone is obliged to take care of animals that are in need of it.

more taken into account and plays an important role in government policy. In 2003 the Ministry of Agriculture organised a national debate about the future of intensive farming (Debat Toekomst Intensieve Veehouderij). The debate intended to bring together several parties to look for and discuss solutions to problems relating to the intensive livestock industry, so parties that normally stand in clear opposition to each other sat down together to discuss problematic issues. The government will not take the lead. Real changes must take place in the sector itself, and the government, if possible can have a coordinating task rather than a prescribing legislation from above.

France

The mobilisation for animal welfare begins in France with the birth of the SPA in 1845 (Société protectrice des animaux) whose main goals are to protect animal life and think about the question of animal suffering. This leads to the set-up of several laws relating to humans' duties to animals. Recently in developed societies, most societal and political decisions about animal conditions result from the mutations in the animal status: they are more and more seen to have individuality and subjectivity. Many European steps have influenced French regulation on these questions and more particularly related to law on dizziness (before slaughtering), breeding conditions, and animal health and welfare in general. In October 2003, the European Commission proposed to sign a European convention on the protection of all animals species regarding international transport; it relates precisely to the design of transport, the health of the animals, the human treatment of the animals, the veterinary certificates, the special conditions concerning transport by road, by air, sea and rail.

Italy

By implementing law 623/85, the Italian government ratified the Strasbourg convention on animal protection in farms and on the protection of slaughtered animals. The national legislation regarding rearing, transport, slaughtering of domestic animals, refers to the European directives. The Italian review refers to extensive national regulation on pets' welfare.

3.4 MOBILISATION AND MEDIA DEBATE

In this paragraph we will present in brief what has been the focus of the different countries media debate, and introduce some of the actors involved. Each country review provides a more thorough presentation. The country reviews also provide extensive lists of significant specialists and research institutes.

France

The SPA (Society for the Protection of Animals) fights against animal suffering, such as cruel traditions (cockfights, bullfights, certain forms of hunting) and animal murder linked to fashion (furs), illegal networks, living conditions of the animals in urban environment and 'criminal gastronomy'. The Brigitte Bardot Foundation has 57,000 donateurs based in more than 60 countries and 323 inspectors. The foundation spreads information through advertising campaigns and newspapers. The Committee for the Vigilance and Action for Animal Well-being (Comité de vigilance et d'action pour le bien-être animal) has 26 association members which act to make animal welfare part of the public debate and to encourage politicians to make it a major part of their electoral campaigns. The French foundation of animal rights (since 1977) seeks to restore a balanced relationship between humans and other animal species. The French branch of Compassion in World Farming, PMAF, acts to modify food habits, to reduce the sale of the products obtained in industrial breeding. In 2004, the Academie de la viande has included animal welfare concerns as additional criteria in their awards.

UK

There are several important national animal welfare charities in the UK which have a particular interest in farm animal welfare. Notably these include the Royal Society for the Prevention of Cruelty to Animals (RSPCA), which is also a member of the European animal welfare organisation, EuroGroup for Animal Welfare; Compassion in World Farming (CIWF – which is an international farm animal welfare group but has its headquarters in the UK); and the Universities Federation for Animal Welfare (UFAW) which advocates the use of 'science in the service of animal welfare'. Increasingly, these organisations influence both consumers and policy makers on farm animal welfare matters, often through the use of targeted campaigns on particular issues (for example, CIWF's campaign against the long distance transport of live farm animals in Europe). In the case of the RSPCA, a farm animal welfare assurance scheme for livestock food products ('Freedom Foods') has been used to try to encourage consumers to purchase more 'animal friendly' food products.

Italy

A significant part of the debate in Italy on initiatives regarding animal welfare issues is linked to a number of animal rights/vegetarian/anti-vivisection associations and is mostly taking place on the Internet. The vast majority of associations work through internet campaigns which aim at creating awareness about various issues, such as hunting, circus and fur farming, rearing practices/vegetarianism, mistreatment of animals, vivisection, and cruelty free cosmetics and household items. With regard to other media, there are few specific events that are covered on television or by the newspapers. However, wider issues, such as those connected to food safety (mad cow disease, dioxine chicken, methanol wine and other food scandals) or to more technical/legislative issues ('on crimes against animal feelings'), have been repeatedly covered by the television news and the newspapers. In the latter case, this has been a

consequence of the discontent among the supporters of various organisations about the lack of consideration for fundamental sectors such as hunting, animal rearing and testing. Some specific initiatives, such as the Veg festival in Torino, have also been covered by numerous Italian newspapers, given their popularity, and the same is true for animals related to ‘animal liberation’, especially in fur farms, on behalf of environmentalist organizations. The vast majority of other initiatives target a specialized audience, and hence fail to involve the consumers.

The Netherlands

In the Netherlands the issue of animal welfare is quite often discussed in the national media debate, most often in national newspapers. Spokespersons of organisations put forward their ideas on issues, as well as specialists and scientists, and sometimes politicians. Readers also send in letters. Most of the time, the intensive livestock industry in general is discussed, and it is claimed that it should be transformed into a more sustainable form of agriculture. Recently media debate circulated around the death of a controversial politician, Pim Fortuijn, who was killed by animal rights activist Volkert van der Graaf. Also, feelings ran high during the Foot and Mouth Disease when 265,000 cows were killed, of which 200,000 animals were not infected. The so-called price war in Dutch supermarkets is also a topic, as is the long transportation distance and hours. Incidentally, specific welfare issues, such as welfare problems of broiler hens or pigs, get media attention. But despite this, the media do not cover extensively issues that get a lot of attention by animal welfare organisations and political parties. It seems, for example, that the politically discussed long transport of cattle is not as frequently discussed in the media as it is, for instance, in the UK. The Dutch Organisation for the Protection of Animals is one of the oldest and largest animal protection organisations. Pigs in distress, Animal Awake, CIWF Netherlands, and Environmental Offensive Wageningen are also active organisations. They focus on the welfare of animals in agriculture.

Sweden

Animal welfare is an issue in the public discourse in Sweden, but the attention varies.¹⁷ A general impression is that attention has increased in recent years and that the question of animal welfare and, in particular, animal rights has become an everyday and justifiable issue in many respects. Those aspects that seem to have been debated most include: caged hens, the use of electric ‘drivers’, salmonella (which is directly related to the consumers), vegetarianism, transport, as well as fur. The initiative to bring the issue up often comes from NGO’s but also from journalists. It has happened that the initiative has come from organic farmers too. Even on the formal political agenda – in Parliament, government and in the political parties – animal welfare concerns have been an issue. The Green Party in Sweden, in particular, but also a former member of the European parliament (Marit Paulsen) representing the Liberal Party, has been active in

¹⁷ The following notes on the public discourse are based on information from interviews with Birgitta Karlsson, Djurens rätt, and Jenny Jewert, journalist at DN (Swedens most important newspaper).

bringing the issue up in the political debate. There are a number of non-governmental organisations in Sweden which focus on animal welfare, animal rights and/or protection of the animals. The largest, most well known as well as the most influential of these is the Animal Rights Association ('Djurens rätt'), with about 40 000 members.

Norway

Food debates in Norway have been related largely to product prices: politicians arguing for consumer friendly, prices on the one hand, and farmers arguing that Norwegian quality products cost more, on the other. Lately, product variety has also been brought into this discussion, making it more complicated as variety and quality cost more than the more common bulk production. The public debate regarding animal welfare has mainly centred on certain animals, animal diseases and nutrition in Norway. The animals mostly in focus are chicken and hens, whales and seals, wolf and sheep, farmed fish, and fur animals. Arguments are based on animals' 'natural' rights, the need to protect and care for human food resources, or caretaking of human health and food safety. The Norwegian Federation for Animal Protection focus on improving the conditions of farm animals in general, including the conditions during transport. Further campaigning to abolish battery hen systems and preventing fires in buildings housing animals are of importance. In addition, the federation focuses heavily on conditions of farmed wild animals. The Norwegian Animal Rights Organisation (NOAH) fights against the abuse of animals and wants commercial usage of animals banned and no animal to be treated as a commodity. They see the fight for animal rights as a continuance of the ethical tradition of fighting for every human's right to a meaningful life according to their species nature. They are opposed to all caging of animals and to hunting of wild animals, and they encourage a vegetarian lifestyle. The Norwegian Animal Welfare Alliance's work is based on the assumption that an animal's intrinsic value is independent of the animal's species, individual qualities and human emotional relationship to the animal.

4

TWO COMPARATIVE STUDIES AND EU STATISTICS

In the following, two relevant comparative studies are presented, along with statistics from the EuroBarometer. The EU funded projects ‘Trust in Food’ and ‘Consumer Concerns about Animal Welfare and the Impact on Food Choice’ are presented by their respective coordinators, Unni Kjærnes and Mara Miele. Hanna Bergman has written the presentation of relevant questions in the EuroBarometer.

4.1 TRUST IN FOOD¹⁸

Introduction

This paper will give a short overview of the objectives, the design and some main results from the TRUSTINFOOD project. Not yet finalised, the results must be regarded as preliminary.

Consumer trust has become a key word in European debates and policy initiatives in relation to food. It is tempting to associate this with the series of food scandals and crises that have occurred over the last 10-15 years. But there do not seem to be any direct links between the extent of scandals and the level of distrust, nor are any of these phenomena evenly distributed throughout Europe. Even though a number of measures have been established in order to avoid or deal with consumer distrust, there is still considerable uncertainty as to when and how crises of distrust occur and in what ways trust can be (re)established. Media debates being the focus of attention, it has been assumed that more and better consumer information is a key. However, a number of studies have shown that successful information depends on trust in its sources. What, then, are the decisive features? Are there other factors involved than those associated with consumer information? And what is the association between trust, distrust and consumption? The general assumption in the TRUSTINFOOD study is that trust in food

¹⁸ Consumer Trust in Food. A European Study of the Social and Institutional Conditions for the Production of Trust – TRUSTINFOOD (QLK1-CT-2001-00291).

is social and relational and that characteristics of institutional conditions are important for explaining variations in trust. The theoretical conceptualisation of consumer trust has therefore concentrated on trust embedded in consumption seen as institutionalised practices, on characteristics of trust in interaction with other actors, and on a possible distinction between the dynamics of trust and of distrust.

Design and methods

The objectives are obtained through a workplan including four steps. Primary data collection has included three elements: a. representative population surveys in six European countries (Denmark, Germany, Great Britain, Italy, Norway, and Portugal); b. institutional pre-conditions associated with consumer responses to food issues in the same six countries; and c. relevant EU policies and institutions at the European level. The studies have addressed three major sets of actors: market actors (farmers, the processing industry, retailers), public authorities and consumers, and other actors, like food experts, NGOs and the media. Particular focus in the empirical work has been on two food cases: beef and tomatoes. The institutional parts have included secondary data and statistics, key informant interviews and media studies. Each set of institutional data have, including structural and discursive elements, have been analysed and reported separately. It is hypothesised that three social and institutional dimensions are particularly important for explaining variations in consumer trust in food, the social distribution of responsibility for key food issues, the institutionalisation of the consumer, and the institutionalisation of distrust. Building on an approach developed by Ragin, multi-level analyses include, first, a comparative analysis of the institutional studies, and, second, a synthetic analysis triangulating the qualitative and quantitative data that have been collected. The comparative analyses have applied a vertical perspective, analysing national configurations of institutional characteristics and trust levels, and a horizontal perspective, trying to identify specific social and institutional mechanisms which may explain the national variations and temporal shifts in trust. The project is expected to produce a multi-dimensional concept of trust and analyses linking diverse institutional arrangements with consumer attitudes, across various countries and at the EU level. It will thus facilitate a fuller grasp of the consequence of EU policy initiatives as an important milestone.

Results

Computer assisted telephone interviews (CATI) were carried out in November 2002. The results from the survey confirm our anticipation of systematic variations between the countries with regard to a range of measures of trust in food (Poppe and Kjaernes 2003). Italian and Portuguese respondents demonstrate the biggest problems with trust in food, followed by the Germans, while Danish, Norwegian and, in particular, British consumers show rather high levels of trust in food according to the included indicators. These variations are generally bigger and much more consistent than differences between social groups within the countries. There are, however, similarities between the countries with regard to the evaluation of the safety of various foods: fresh fruits and vegetables are generally ranked high, various types of meats have medium ranking,

while restaurant meals and hamburgers from fast-food outlets receive most worry. Consumers across Europe have identical ranking orders with regard to who will tell the whole truth in case of a scandal with chicken. Consumer organisations and food experts are generally ranked highest, food authorities and the media in the middle, while market actors like retailers, farmers and the manufacturing industry are least often believed to tell the whole truth in this case. If we look at the impact of trust in actors on trust in food (an index), it is those with most power to control the condition, market actors and food authorities, that matter most. Finally, it is noteworthy that while trust in food safety has probably improved, considerably in some countries while only slightly in other countries, other food issues cause more worry, including nutrition, quality, ethical issues and price.

In spite of regulatory harmonisation and market integration, the institutional country studies do show considerable variations. A general impression is that while events and actions to a large degree are influenced by European integration and globalisation of food markets, as well as by Community and other supranational policy decisions, debates and institutional solutions reflect country specific traditions and policies. Considering the roles, powers and responsibilities of different types of actors, there are distinct configurations within each country setting. The solutions regarding the distribution of responsibilities for key food issues, like safety, quality, nutrition, ethics, and value for money, are quite diverse. At the public level, there are institutional reforms in all countries, in particular with regard to food safety, but the solutions are quite different. There are variations in the degrees of centralisation, coordination, clarity, and performance. Institutional characteristics, such as the degree of transparency, predictability and independence, demonstrate highly diverse patterns (public/private, big/small, etc.). This is also reflected at the discourse level, both with regard to the definition of problems and solutions and the degree to which these definitions and solutions are associated with consensus or controversy. Countries with low levels of trust are characterised by controversy and fragmented responsibilities. Low-trust countries also have more diverse food provisioning systems, with larger proportions of foods like tomatoes and beef being sold with low degrees of processing through small shops and food markets. The distribution of power between actors along the food chain and between public and private sectors varies considerably. It seems that in high-trust settings at least one powerful institutional actor is trusted in case of a food scandal. The role and perception of consumers, individually and collectively, also differ considerably.

Food related practices in the various countries, such as eating and shopping, are quite diverse, reflecting differences in food cultures and family patterns as well as provisioning systems. As such, they are also framed by different conditions for trust. Analyses indicate, however, that institutional conditions matter considerably more for trust in food than individual strategic responses, such as choosing a different type of shop or an alternative product, like organic food. Trust (and distrust) is not unconditional, but it refers to much more than conscious choice in the market. In some cases, making use of the consumer role to express personal or political concerns matters. But in most of the countries, only a minority of the consumers come out as active, reflexive individuals confident in their own ability and power to choose and to influence. While an image of consumers as passive and to be protected in some settings

is shared by all or most actors, consumers are more often seen as active individuals in others. In some cases, in association with low levels of trust, the consumer role is much more controversial and uncertain. While consumers generally represent a rather weak party within the food systems, institutionalisation of consumer distrust (through independent parties, transparency and voice) seems to promote consumer trust.

Conclusions

The study has found that consumer trust and distrust vary considerably and consistently between countries. There are basic differences between the Nordic, British and South European situations, Germany being in a transitional state. This variation seems to depend on nation-specific social and institutional contexts. European integration and globalisation processes have impacts but are handled very differently across Europe, depending on national economic interests, political traditions, etc. Concerning general mechanisms determining trust, distinctions can be made between general cultural and social conditions which change only slowly, and institutional structures and performance, where more rapid shifts can be expected. Trust and distrust seem to depend less on consumers' own strategies.

4.2 CONSUMER CONCERNS OF ANIMAL WELFARE

This summary is based on a European Union-funded project 'Consumer Concerns about Animal Welfare and the Impact on Food Choice' (CT98-3678). The project was set up in response to evidence of growing concerns about animal welfare amongst consumers in the European Union. Such evidence comes from the increasing demand for food products which are perceived by consumers to be more 'animal friendly', e.g. free-range eggs, the growth in the number of vegetarians and calls for stricter regulation of welfare in animal production. Such concerns have implications for the future consumption of products such as meat, eggs, milk and dairy products and the role of these products in nutrient intake. Furthermore, there are important implications for producers and retailers of animal-based food products within the EU. The purpose of the project, therefore, was 1) to identify the specific nature and level of consumer concerns about animal welfare; 2) to identify the qualitative and quantitative differences in concerns about animal welfare both within and between EU member states; 3) to assess the potential impact of changes in animal production practices on the choice of animal-based food products; 4) to explore the trade-offs consumers make between animal welfare and other product attributes; and 5) to assess the implications for the future of the animal-based food products industry within the EU.

Methods

The first stage of the project involved a review of the literature on the demand for animal products and consumer concerns about animal welfare. The second stage of the project utilised focus groups to explore the nature of consumer concerns about animal welfare in each of the five study countries (United Kingdom, Ireland, France, Italy and Germany). During the groups, participants viewed video footage of various production systems, indicating the positive and negative aspects of each with respect to animal welfare and the animal products. The third stage of the project involved laddering interviews with consumers focusing on the attribute-consequence-value means-end chains that characterise animal welfare. The fourth stage of the project involved a survey of a representative sample of consumers in each country. The final stage of the project is an assessment of the implications of the results in order to devise strategies to address consumer concern about animal welfare.

Results

The focus groups revealed consumers were spontaneously concerned about food safety, health and quality rather than animal welfare. When asked about animal welfare, consumers use animal welfare as an indicator of other, more important, product attributes. Consumers used the concepts of 'natural' and 'humane' to describe the ways in which farm animals should be treated. Although participants believed that it was right that people ate animal products, they generally disassociated the product from the animal of origin in order to assuage their conscience. Most consumers felt that they were not well informed about animal production systems. Participants tended to assume theoretical responsibility but claimed that, as individuals, they were powerless in making any substantial changes. Most of the groups said that they were willing to pay more in principle for improved animal welfare, dependent on the initial cost of the product and the way in which it would be used. Invariably, those consumers also stated that the product would have to have other improved quality characteristics such as taste. Consumers generally preferred the free-range systems for all products; however, they also recognised that there would be increased costs associated with more extensive systems of production, therefore, there was a tendency to compromise cost versus welfare and accept the semi-intensive systems. The exception was veal, where most consumers objected to the production of veal under any system. The results were explored further in a series of interviews.

Means-end chain theory proposes that consumers are motivated by core values when making purchasing decisions. The interviews aim to reveal those values, which motivate consumers' concern about animal welfare as a production process characteristic and, thus, affect food choice. The results indicate that consumers are equally motivated by human health (anthropocentric) concerns as they are about animal welfare (zoocentric) concerns. Indeed, attributes of animal welfare, which may result in the same consequence, often split into anthropocentric and zoocentric values, thus supporting the findings of the previous focus groups. There appear to be no significant differences amongst the countries in the types of values consumers use to motivate their concern about animal welfare. The interviews confirmed that the perceived relation amongst

poor welfare conditions, food safety and the effects on human health significantly motivates concern about animal welfare. The qualitative results generated hypotheses, which were tested quantitatively by the survey.

The survey results demonstrate a high level of concern about animal welfare. As expected, zoocentric measures of animal welfare were rated higher than anthropocentric measures of animal welfare; however, the most important reasons for change in consumption are related to health, cost, changes in diet, household composition and lifestyle, rather than concern about animal welfare. When specifically asked about animal welfare, consumers claimed that they had either reduced or substituted consumption, a claim which is unsubstantiated by market figures. Consumers were 'somewhat informed' about egg, milk, poultry and beef production, whereas, they were 'somewhat uninformed' about pork, lamb and veal production. All the attributes associated with animal welfare, identified in the interviews, were considered important beginning with quality of feed (a factor undoubtedly affected by BSE), outside access, expressing normal behaviour, conditions of transport and, finally, conditions of slaughter. Only conventional production of milk and lamb was rated 'somewhat acceptable', whereas, pork, beef, egg, veal and, finally, poultry production were all rated 'somewhat unacceptable'. The most commonly consumed 'animal-friendly' products were free-range eggs. The most important barriers to purchasing 'animal-friendly' products were lack of information and availability. Lack of personal influence on animal welfare standards, disassociating the product from the animal and, finally, cost was rated less important. Consumers rated consumers' organisations, animal welfare organisations, friends/family, environmental organisations, butchers, scientists and farmers' organisations 'somewhat trustworthy' as sources of information about farm animal welfare, whereas supermarkets, the food industry and, finally, the government were rated 'somewhat untrustworthy'.

Conclusion

The results reveal that consumer concerns about animal welfare are multi-dimensional. Consumers, although concerned about the well-being of animals and unnecessary cruelty and suffering, are equally motivated by the impact of animal production systems on the quality of food. Significantly, consumers believe that intensive systems are unnatural and, therefore, unsafe. Concern about the animals alone is not enough to motivate consumers to purchase 'animal-friendly' products. Indeed, it is the fact that consumers use animal welfare as an indicator of other product characteristics, which has an impact on food choice. Consumers make trade-offs between cost and animal welfare (although they rate cost the least important barrier) and, therefore, compromise their concerns about animals by expressing a pragmatic preference for semi-intensive production systems. Furthermore, consumers overestimate their purchase of 'animal-friendly' products, reports that are unsupported by market figures. Due to the nature of their concern, the explicit trade-offs between animal welfare and other product attributes and their compromises in terms of food choice, consumers favour a legislative, rather than a market, approach to improving farm animal welfare.

4.3 EUROBAROMETER

Eurobarometer measures public opinion in the EU and is repeated regularly, including a number of questions which are raised on the public agenda. Representative surveys are conducted by the European Commission in all EU member states, providing valuable material for comparative analyses. It was therefore reasonable to look for statistics concerning related to animal welfare concerns. The approach was rather wide, including themes like food and meat consumption, animal welfare, organic food, food and meat labelling, and vegetarianism.

There is no survey presented in the barometer with particular interest in animal welfare concerns, nor have questions about animal welfare concerns been asked. The issue that has been evaluated concerning meat consumption is the confidence the population in different countries has in food products. In 2002 86% of the population in the European Union thought that it should be an EU priority to guarantee the quality of food products.¹⁹ Concerning animal products, a 1998 survey reveals that confidence is high when it comes to dairy products, with 79% finding the products safe. People seem to be less likely to trust animal products such as fresh meat to be safe. Overall 60% have confidence in fresh meat, while 34% do not have confidence in fresh meat. The variations between countries are significant in the 1998 survey; people in Italy have the most confidence in fresh meat with 85% saying that the meat is safe, while 10 % do not think it is. In Sweden, 78% is saying that they believe fresh meat is safe, while 15% do not. In the Netherlands, 72% has confidence, while 22% do not. In the United Kingdom, 67% state that they believe fresh meat is safe, while 23% do not think so. In France the number of people that have confidence in fresh meat equals the number that do not believe that fresh meat is safe, with both categories including 48% of the interviewed. Of all the countries included in the survey, Germany shows the highest distrust, with 57% saying they do not have confidence in fresh meat products.²⁰

The 1998 survey also showed that the most widespread concern about food safety is found when it comes to pre-cooked meals, with 39% of the people asked in the survey having confidence in this kind of food while 49% doubt its safety. Finally, in a 2003 study concerning eating habits, 27.7% of the people interviewed stated that they have reduced their meat consumption. No demographic background variables for the people stating this are included and the reasons why they decreased their meat consumption have not been analysed further.²¹

¹⁹ Standard Eurobarometer 57, Spring 2002, EU15 Report, p.73.

²⁰ Standard Eurobarometer 49, September 1998, pp. 84, B64.

²¹ Special Eurobarometer, Health, food and alcohol and Safety, December 2003, pp. 32–33.

5

CONCLUDING REMARKS ABOUT THE LITERATURE REVIEW

5.1 SUMMARY OF COUNTRY CHARACTERISTICS

UK

The welfare of farm animals has become an important issue for British consumers, producers and policy makers, according to Bennett (1995). British meat consumers are thought to be more animal welfare aware and concerned compared to their European neighbours (Hughes, 1995). It is an issue of increasing importance for consumers, producers and government in the UK.

Despite increasing institutional activities with regard to farm animal welfare and despite the high proportion of consumers who state that they are concerned about the animal welfare implications of the food that they purchase, 'animal welfare friendly' food products represent a relatively very small proportion of total food products purchased. This may be due to the limited supply of such goods to the market and the lack of widely recognised farm animal welfare assurance schemes.

Sweden

Consumption of organic meat can be related to the lifestyle of the consumer in general as well as engagement in society at large. It is, it seems, not just a question of animal welfare, but it might also be a way of expressing one's identity. This points to the importance of including a contextual analysis.

High levels of trust in both Swedish producers and Swedish authorities, together with quite low levels of knowledge about point in the same direction: the importance of considering values in the society at large.

The gap between positive attitudes to organic meat and actual consumption, on the one hand, and an increase in meat consumption, on the other, indicates the debate and questions about knowledge, information and trust will be more central in the future.

The complex nature of the consumers' animal welfare concerns, which seem to vary between products and issues, points to the importance of specifying the different animals in future analysis, while the attitudes might differ in a systematic way.

Finally, there is a lack of studies focusing more directly on the Swedish consumers' animal welfare concerns, making any future study in this field important.

The Netherlands

First, the role of information in research is discussed (Te Velde et al., 2001). Avoiding information one does not want to know about is one of the coping strategies consumers use to avoid feelings of guilt (the concept of coping strategies is used in social-psychology). This suggests, if this is in fact the case, that the strategy of providing the consumer with more knowledge in order to increase the market share of animal friendly products is too one-sided a strategy. The idea that consumers need more information to be able to make a responsible choice should then be put into perspective. It is suggested (Beekman et al., 2004) that it is important in these circumstances for consumers to be able to trust regulatory systems and farm monitoring practices, as well as food labelling, which guarantees optimal animal welfare in farming practices. The role of information within buying patterns, and the idea that consumers actively avoid getting information as a coping strategy could need further investigation.

Furthermore, other aspects than information about the way products are produced are important. Research shows that price and availability also play an important role. From this it can be concluded that more research must be carried out after willingness-to-pay.

Third, consumers do not have unambiguous ideas of animal welfare. They do not strictly distinguish between animal welfare, environmental aspects, food safety and quality (Beekman et al., 2003; Beekman, 2004). They think animal welfare goes hand in hand with positive developments of other aspects such as landscape, human health, environment and macro-economics (Te Velde et al., 2001). This suggests that animal welfare should be addressed in relation to these other aspects.

Fourth, it is argued that involvement in animal welfare issues (for example, in retail outlets through detailed provision of information regarding animal production systems) may have a negative impact on the sales volume of animal-derived products. Involvement is better confined to the citizen, where it is actively solicited using validated methods of public participation (perhaps through a citizens panel or consensus conference) (Beekman, 2004). Whether or not detailed provision does indeed have negative impacts on sales, this recommendation is useful regarding the discussion on the role of information generally.

Norway

Human health The use of hormones, antibiotics, GM and additives in modern food production is considered by many to be a health risk to humans. This fear is a strong

argument of animal welfare in food production, even if the main focus is human safety rather than animal living conditions.

Animal health and food quality Many claim that they can taste the difference between meat from well-treated and ill-treated animals, and they certainly prefer the first category. Intensive and industrialized farming are believed to cause stress, diseases and reduced living conditions for the animals and hence reduce the meat quality, as are pain and stress during transportation and slaughtering. The distinction of good and bad quality is also made between farmed and wild animals.

Animal rights and a 'natural' life Animal welfare is often linked to the animals' living conditions, with 'the wild' as the highest standard. Hence, resemblance of 'natural' living conditions has become criteria of grading animal welfare in food production. Access of outdoor space, daylight, and the ability to move freely are examples of how animal welfare is considered to be taken care of. Consideration for animals' emotions such as fear, stress and pain are also of importance to consumers, and some find it important that animals are given some choice for themselves about some of these aspects.

France

Industrial husbandry is seen as the symbol of intensive industrial practices and is strongly rejected. The bad feed given to animals, profit motivation, transport conditions, accelerated production delays are denounced.

The fact that people like foie gras limits the sensitivity for animal husbandry. There is greater acceptance of the crowding of geese and ducks especially among the higher classes, men, the under-35s. On the other hand, to be an occasional consumer of meat, to have a pet, to divide political ecological ideas and to have ties in the agricultural world contribute to the rejection of this practice.

Italy

There is a lack of information about animal welfare issues in Italy, as well as existence of deceptive information both concerning labels and concerning existing laws. In addition, the Italian literature review reveals a lack of information about consumer concerns and behaviour towards animal welfare issues – much in line with other countries. Consumers seem to link food quality with animal welfare.

To Italian consumers the main reason for ensuring animal welfare in production conditions are: human health, food quality and animals condition in livestock/animal rights.

5.2 IMPORTANT DIMENSIONS IN CONSUMERS' RELATIONS TO ANIMAL WELFARE

Based on the six country literature reviews, one can point towards some important dimensions regarding consumers' relations to animal welfare – for example, an awareness about animal welfare seems to have increased in the study countries during the 1990s and in more recent years. An important awakening factor in that direction has been the various scandals involving the meat sector and the subsequent debate in the mass media. The increasing consumer concerns about animal welfare issues within the European Union (EU) are, for example, reflected in the increasing amount of legislation designed to improve the welfare of farm animals within the EU (Wilkins, 1999; Bennett and Blaney, 2003). However, these attitudes are most often reflected in more traditional political activities, such as the growing support obtained by animal rights/welfare groups. In all countries, apart from the UK, concerns have not yet generated a new and significant demand.

The awareness has, however, been accompanied by more people being sceptical towards their own meat consumption. Scepticism may be linked to changes in demand, but not always and in all cases. Consumption statistics show significant drops following the BSE crisis in Italy, France and Britain, particularly for beef. The consumption of beef has for the most part been restored. On the other hand, although increasing concerns were observed even in countries like Sweden, the Netherlands and Norway, there were no clear drops in demand. Comparative studies indicate that trust in actors in the food sector may at least partly explain these differences. Drops in demand were in general associated with a lack of trust in institutional actors, and in public authorities in particular.

Another factor that may explain country differences in the links between public concern and consumer practices is the social distribution of responsibility for animal welfare. Studies indicate that consumers don't see animal welfare in food production as mainly their responsibility. In Sweden, the Netherlands, the UK and Norway most people direct this responsibility to the government and secondly to the producers and the retailers. This may be one explanation why there is a gap between attitudes and concerns between animal welfare, on the one hand, and eating practices, on the other. This is especially visible in Norway and Sweden.

It is, however important to recognise that short-term shifts do not necessarily translate into long-term trends. Many studies have observed that habits are not easily changed. This point has been raised in studies of the consumption of organic food. Eating and shopping for food are subject to considerable routinization. Consumers seem to follow old habits and, as pointed out in one study, habits are changing slowly (Grankvist 2002). This is probably also the case regarding animal welfare friendly products. This report has shown that when such routines are suddenly broken in case of a food crisis, there is a tendency that old habits are restored when conditions again become normalised. It is important to notice that some animal products, like different types of

meat, have a prominent position in many European culinary cultures. Changes in the social status of foods are taking place, one example being chicken, which has changed from being a high status to an everyday food item. But such processes take considerable time and will be influenced by a number of factors.

Interest in animal welfare issues and association with consumption practices seem to vary between social groups in somewhat similar ways in the study countries. It is evident that factors like age, gender, social class and education matter for mobilisation referring to animal welfare as well as eating patterns. However, it is difficult to indicate how such differences may contribute to explanations of variations between countries or temporal shifts. Still, social distinctions, differences between generations and the gender division of labour may influence how tendencies of change affect for example consumption patterns. In France, research indicates strong relations between social class and meat consumption and, while gender seems to be such an indicator in all countries, generation differences are most evident in Italy.

When studying how animal welfare concerns are being translated into changes in shopping patterns, it is important to consider the highly variable structures of the food distribution systems and the supply of animal friendly food products. Such differences may affect the actual availability and price of such products and information about them as well as trust relations and notions of responsibility. It seems obvious that when the Swedish and Norwegians hold the government responsible (and trust it to take on this responsibility) for supervising and regulating the agricultural sector, this influences the way they see their own responsibility. The UK, with significantly more market based animal welfare programmes and labels, combined with a consumer role focussing more on active individual shoppers, gives a very different situation for handling animal welfare within a market context. The Italian case provides a third position, where the market structure and the distribution of responsibilities are much more fragmented and unclear, and where institutional actors, and public authorities in particular, are not highly trusted.

It is also important to consider consumer concerns of animal welfare as contextualized. There are strong sets of norms and values attached to the relations between humans and animals, such as limits regarding who or what is considered edible. These norms and practices vary across time and culture – indicating the underlying dynamic processes of this phenomenon. Terragni and Torjusen (mimeo) build on results from the Trust in Food study and suggest that it might be fruitful to consider the different roles people as consumers are institutionalized into, such as:

- the consumer as eater (defining the edible, proper and tasty);
- the consumer as co-producers (considerations taken regarding meal preparation);
- the consumer as shopper (availability, price and labelling);
- the consumer as media user (availability and quality of information related to AW);
- the consumer as citizen (opinions on division of responsibility and consumer power).

Depending on which role one enters different concerns related to animal welfare might be in focus: human health, animal health and food quality.

Some questions for further study resulting from from this summary report are: How is the market structure reflected on the consumer side? How do people perceive animal friendliness of food products and how is this reflected in their roles as eaters, shoppers and citizens? Is animal welfare the consumers' responsibility and do consumers take on such responsibility? What can the market structure, retailer system and regulatory context tell us regarding the consumer role? Do people consider the importance of animal welfare in other roles than as consumers (i.e. as eaters, parents, citizens)?

KEY STUDIES

Some of the country reviews present an overview of the key studies found, these are presented her. There are no such listings of main studies in the reviews of France, UK and Sweden – but information on key studies is distributed throughout their reports.

Italy

The EU project ‘Consumer Concerns about Animal Welfare and the Impact of Food Choice’ is the only Italian study about animal welfare. This EU project has been carried out in the period July 1998–July 2001. Five academic partners, the University of Pisa (Italy), the University of Reading (UK), the University of Kiel (Germany), INRA (France), the National Food Centre (Ireland), two industrial partners, An Bord Bia (Ireland), the Meat and Livestock Commission (UK), and a representative of animal welfare groups, Eurogroup for Animal Welfare (Belgium), participated in this project coordinated by Spencer Henson of the Centre for Food Economic Research, University of Reading. The research assessed the nature and extent of consumer concerns about animal welfare in the five EU countries and the implications for the future demand for animal-based food products and identified potential strategies which address consumer concerns about animal welfare. This project included qualitative and quantitative analyses.

The Netherlands

- Beekman, V., Bracke, M.B.M., Van Gaasbeek, T. and Van der Kroon, S. (2002) *Begint een beter dierenwelzijn bij onszelf?*, LEI, Den Haag.
- Beekman, V., Dagevos, H., Van der Weele, C. and De Greef, K. (2003) *Diergericht ontwerpen: consumentenwensen rond dierenwelzijn*, ID-Lelystad, Lelystad.
- Beekman, V. (ed.) (2004) *Als een vis in het water. Maatschappelijke acceptatie van ontwerpen voor nieuwe diervriendelijke veehouderijssystemen*, LEI, Den Haag.
- Berg, J. ter, Franssen, J. and Verhulst, D. (2003) *Burgeroordelen over de veehouderij: uitkomsten burgerpanels*, Rathenau Instituut, Den Haag.
- Frewer, L., Kole, A., Van der Kroon, S. and De Lauwere, C. (2005) ‘Consumer attitudes towards the development of animal-friendly husbandry systems’, mimeo.
- Velde, H.M. te (2001) *Hoe oordelen wij over de veehouderij?*, Rathenau Instituut, Den Haag.

Verhue, D. and Verzijden, D. (2003) *Burgeroordelen over de veehouderij: uitkomsten publieksonderzoek*, Rathenau Instituut, Den Haag.

Norway

Although many studies have been conducted on consumers and consumption of food in Norway, these have mainly had other focuses than animal welfare. Food safety and food as tradition and institutional praxis have been central.

Lisbeth Berg's report (SIFO 10-2002) on consumer knowledge and opinions regarding animal welfare is central in the sense of being the only Norwegian report directly aiming towards knowledge on consumers' relation to animal welfare. It is a quantitative study that gives us a brief overview of this field. Maria Guzmán and Unni Kjærnes' qualitative study (SIFO 6-1998) represents the most thorough study of the human-animal or subject-object relation in Norway, and it provides valuable input for further study of this field. Also, the consumer panels (FR 1-2003 and FR 2 and 3-2004) are central because they are the most recent work in this field in Norway and because they represent a different perspective as they have a somewhat political agenda. A considerable amount of work has also been done in the field of consumers trust in food in Norway. This literature has to a great extent been focussing on food safety and trust in various actors in the food production and distribution chain.

TABLE 6.1 Food consumption research in Norway

Source	Method	Participants	Objective
M. Guzmán & U. Kjærnes, SIFO Working report no. 6-1998	Qualitative interviews and literature review	14 vegetarians and 25 non-vegetarians. Literature review public documents	Consumer arguments underlying attitudes towards, and consumption of meat
L. Berg, SIFO Consultant report no. 10-2002	Survey, telephone interviews	1000 consumers (general population)	General questions on consumers knowledge and opinions regarding animal welfare
E. Bjørkum The Consumer Council (FR) Report no. 1-2003	Debates in The Food Policy Consumer Panels	63 consumers, (7 counties of 9 participants)	Debates related to consumers desire of information and labelling of food
E. Bjørkum The Consumer Council (FR) Report no. 2-2004	Debates in The Food Policy Consumer Panels	63 consumers, (7 counties of 9 participants)	Debates related to consumers satisfaction of food assortment in stores
E. Bjørkum The Consumer Council (FR) Report no. 3-2004	Discussions between The Food Policy Consumer Panels and The Food Safety Aut.	63 consumers, (7 counties of 9 participants)	Discussions related to consumers expectations of the Food Safety Auth.

THEORETICAL FRAMEWORK: INTRODUCTION

According to the Technical Annex, Sub-project 1 investigates societal attitudes and practices as they impact upon animal welfare and assesses to what extent new welfare strategies might be achievable in practice. Work Package 1.1 analyses consumer concerns about food animal welfare, the type of information demanded, and the most effective communication and information strategy. It builds on previous findings that while many consumers are interested in animal welfare this has little impact on actual purchasing habits. The main factors limiting demand for welfare friendly foods are the lack of availability, appropriate information, and trust. Currently, there is little knowledge about how configurations of supply and communication may influence consumer attitudes and demand for ‘animal friendly’ food products. The sub-project will delve more deeply into these issues and seek ways of overcoming barriers.

In WP 1.1, country reviews have sought to provide an initial overview of the varying conditions throughout Europe, indicating even the status of knowledge about issues related to consumers and animal welfare. These reports demonstrate that it is not an easy task to capture how people relate to animal welfare in their role as consumers. The reports indicate large variations between countries. This is supported even by the country reviews on producers and on distribution systems. The country reviews on consumers moreover suggest that consumer views and practices are influenced by a complexity of factors and that several dimensions should be considered in an analysis of country variations.

The variety of dimensions refers even to a multiplicity of scientific approaches that may be of relevance. The purpose of the following chapters will be to briefly outline this multiplicity and indicate how they may productively be put together in the formulation of research questions and to guide the empirical data collection and analyses.

This purpose refers to the main objective of Task 1.1.1.2: to provide a conceptual framework for consumer concerns and practices relevant for the demand and distribution of animal friendly products under different circumstances. It will concentrate on theoretical approaches and conceptual tools that catch the complexity of consumer attitudes and practices and their relations to social and institutional conditions. The more specific objectives are:

- a. to establish a conceptual framework on consumers' motivations and/or concerns in purchasing animal friendly produced products for later stages of the WP and its relationship to other parts of the project;
- b. to aid in the design of consumer research (focus group discussions, interviews etc.) and its input from and delivery to other WP's and Sub-projects;
- c. to list potential problems which need to be addressed in the later stages.

Animal welfare in relation to food consumption raises relevant and academically interesting issues. Based on input from the various partners involved in WP 1.1, a number of distinctly different approaches to animal welfare and consumption emerge. It must be emphasised that while these perspectives in some cases may be in opposition, they will in many cases be complementary, serving to emphasise different aspects and types of conditions. This means that rather than 'choosing' (which seems more or less impossible), we may try to incorporate several approaches into our empirical studies. There may, however, be perspectives that go beyond the purpose of this work package, some possibly to be picked up in other work packages or in later stages of the WQ project.

The paper will first outline central issues brought up by different approaches represented by the various partners in the research team, then try to bring these together in terms of central concepts and dimensions that are of relevance, emphasising links to contextual factors and analyses of variations between countries. The aim is to start outlining how the various approaches, dimensions and concepts may be transformed into operative tasks related to the field research. A simple conceptual model following from this line of thinking is described. Finally, the paper will identify some key issues and items for further study.

8

CONSUMERS AND ANIMAL WELFARE

8.1 ANIMAL ETHICS: THREE APPROACHES

Utilitarianism

In broad terms, there are three approaches in ethics that can assist in posing and solving ethical questions. These are utilitarianism, the deontological ethic, and the deliberative approach. According to the utilitarian or consequential-ethical perspective, an act is proper if its effects are good. This perspective focuses on the consequences of a certain action. The consequences must be evaluated according to the principle of the greatest possible well-being. Jeremy Bentham (1748–1832), the patriarch of this approach, speaks of ‘the greatest good for the greatest number’. If the greatest possible well-being is promoted, and if it does not apply to every person in the same degree and some people might even be worse off because of it, then the action can still be considered ethically proper if the majority is better off.

Utilitarianism thus leads to a consideration of consequences (and only indirectly of principles). It comes close in that way to the cost-benefit analysis as advocated by certain economic movements. There are many variants of utilitarianism, and, according to one variant, principles and general rules (as laid down, for example, by law) are definitely meaningful, because they reduce the risk of a breach of well-being. However, utilitarianism does not take fundamental rights, principles, or obligations into account in a principled way. In general, utilitarianism is permeated by the idea of not causing damage. It is a negative approach, where the main effort goes into limiting the negative consequences of an action.

Utilitarian animal ethics

One of the most influential utilitarian approaches is that of Peter Singer (1975), in which Bentham’s fundamental assertion is taken seriously, that animals (at least mammals) are entitled to moral consideration because they can suffer: ‘the question is not “Can they reason?”, nor “Can they talk?”, but “Can they suffer?”’. Human beings and animals must be considered in an all-encompassing cost-benefit analysis, in order to determine which living beings suffer the most (or whose interests are harmed the most).

This position is not against suffering per se, nor killing (which can be done without suffering), but it seeks the least suffering, taking all factors and all living beings into consideration.

Deontology (rights approach)

Secondly, there is the deontological approach. This strongly emphasizes principles, rights and obligations, in the assessment whether an act is correct or good. Well-known general principles are the autonomy of the individual person and justice, in the sense that all persons are entitled to their own share. The best-known representative of the principle-ethical approach is Immanuel Kant (1724–1804). He does not start out by preparing a list of obligations. Instead, he identifies a criterion, which morally acting persons use to judge whether something represents an obligation. This criterion he calls the categorical imperative. It reads as follows: ‘Act only according to the maxim about which you can wish that it becomes a general law’. In other words: can I wish that everyone acts as I now wish to act? For example, if I wish to borrow money from someone without wanting to return it, I must ask myself, applying the categorical imperative, whether I indeed wish that everyone would act this way (borrowing money without ever returning it). The answer to this is obviously ‘no’, since no one would then lend money to another person anymore.

The animal rights perspective

Tom Regan, author of ‘The case for animal rights’ (1985), is the most influential and most thoughtful defender of the argument that animals have rights. He links his argument to the thesis that animals may not be used as a means for other living beings. In his view, every living animal is an experiencing subject of a life with an equal and inherent value: ‘All have inherent value, have it equally, whether they be human animals or not.’ (Regan, 1985, p. 23) A key aspect of this perspective is the Kantian distinction between possessing rights (which implies that one may not be used) and being a means for something or someone. In that way the discussion, for this perspective, about domestication and about how animals that are subject thereto must be treated is already concluded.

Deliberative (pragmatist) approach

Next to these, there is a third approach that is less directed at cost-benefit balancing (like utilitarianism), principles, the rights of individual persons, and individual choice (like deontology), and more at the values, social context, human solidarity and obligations that have historically grown – in short, an approach that seeks to give an answer to the question as to what constitutes good living in a world full of risks. This deliberative approach takes these insights into account, but it also incorporates aspects of the other two movements, such as respect for autonomy and a certain appreciation of costs and benefits. Individual rights are not, however, considered to possess ultimate value, neither is the cost-benefit analysis. Interests and rights must be made flexible in

forms of deliberation, by responding to each other and to the issue to be solved (Keulartz, 2002, 2003).

Deliberative (pragmatist') animal ethics

According to the deliberative or pragmatists approach, the ethics approach of animals, should start with human-animal relationships, so-called practices. Practices in which animals are kept may be viewed as different ways of realizing a historical contract or an exchange between humans and animals. In a specific practice, animals may receive greater care, giving more of their products or even their lives in exchange. In another practice, they may receive less care but are allowed to produce less. In the context of this variety of contracts, each practice develops its own standard of care for animals. Each of these practices involves different stakeholders, rules, standards, and values, and in a pragmatic approach these should be examined first before we get into any detailed ethical argumentation and decision-making.

The theory of practices set out here, implies that practices impact each other, and assumes a much more chaotic manner of cultural learning, involving border traffic between practices and developments within individual practices. In that way it is a socio-cultural theory rather than a theory of linear biological evolution that rejects the relevance of social institutions and values. The standards of practices influence each other, with a particular practice sometimes taking the lead.

Ethics of public consultations

In the deliberative (pragmatist) approach the emphasis is on discourse and consultations that address ethical dilemmas and value conflicts. There are several types of discourse, like expert meetings, representative meetings, or meetings with focus groups (to get an insight in what is at stake for the various stakeholders). In doing discourses with the aim of stimulating opinions and value assessments, not always and not every discourse or consultation is meaningful and successful, in the sense of enabling to better cope with an ethical problem. In situations of civil war, already fixed policy decisions or very entrenched positions, it is not always meaningful or possible to organize in an ethically relevant way public consultations on value conflicts and dilemmas.

8.2 CONSUMER'S ANIMAL WELFARE CONCERNS AND POLITICAL CONSUMERISM

When considering consumer's animal welfare concerns from a political science perspective, we might start by asking the question: To what extent can such consumer concerns be political? There is, of course, not just one possible answer to that question,

but several. However, regardless of where we will end up, questions about how politics is related to economics, or when citizens are not citizens any more, but just consumers, should be addressed.

Decline in political participation

The democracies of Western Europe today all face a problem with a decline in citizen interest as well as in participation in traditional political institutions. This, it is often pointed out, is seen by looking at several different indicators.

First, in many European countries, turnouts in elections to local and national parliaments are declining. And, when focusing on the elections to the European Parliament, the decline in turnouts is dramatic. This has been interpreted as a major problem for the liberal and representative democracy which has been the foundation of the political systems in most European states. Other indicators are the increasing problems for political parties to attract new members as well as decreasing participation in local associations and community organisations. Both of these activities are central themes in the discussion about political participation. In some countries, in Sweden for instance, an increasing distrust in political institutions has also been shown and in others a decline in political knowledge among citizens has been noted – issues that are closely related to this problem.

All this indicates that there is a growing loss of power by traditional political institutions in the political system. The formal political systems are simply not able to mobilize the support and engagement of citizens as they did in the past, which of course can be interpreted as democracy crises. However, there is not necessarily a general decline in political interest or political participation, but changes in how citizens participate and act politically, as well as changes in social structures which are bringing about new forms of political culture. These changes have been formulated in terms of a ‘individualisation’, ‘postmodernisation’, ‘medialisation’ and/or ‘economisation’ of the society. What these changes indicate, it has also been pointed out, are more individualistic forms of political expression, where temporary alliances are built, rather than long-term allegiance to traditional political organisations. People are more attracted to ‘issues and arenas for involvement that are more flexible, network-oriented, hands-on and that allows them to combine their daily lives with political issues,’ while traditional forms of political participation are viewed as ‘time-consuming, limiting in terms of individual expression, and lacking a sense of urgency’ (Micheletti, 2003, pp. 24–5). The concept of ‘individualistic collective action’ has been used to capture this form of citizen engagement (Micheletti, 2003).

Political consumerism

From the discussion above, we can conclude that political consumerism challenges traditional thinking about politics as centred in the political system of the nation state as well as what we mean by political participation. Political consumerism can be seen as a new form of political participation. Basically, political consumerism is about how

citizens use their purchasing power to influence corporate actors to act in ways which they find ethically or politically acceptable. According to the most recent theories on this subject, the political consumer can act in at least three different ways (Micheletti, 2003; Micheletti and Stolle, 2004): by boycotts, i.e. not buying certain product because of ethical/political reasons; ‘buycotts’, i.e. buying certain products for the same reasons; or discursive actions, i.e. expression of opinions about corporate policy and practice.

Considering political consumption means that citizens have not just become more like consumers, but consumers are also to a certain extent citizens, in that they use their purchasing power to influence market actors to act in a way they find ethical or political acceptable. The market becomes an arena for individualised collective action – which is included in the everyday practices of the individuals. Consequently, taking political consumerism into account means that people’s animal welfare concerns can be understood as a political issue. Consumers who buy (or boycott) certain products (or express opinions about a specific producer), because of animal welfare concerns, might act with the aim of influencing the behaviour of producers and retailers to become more in line with the values held by the consumers. They use the market, instead of more traditional political arenas for political participation.

Explaining political participation

If we now turn to different approaches to explain political participation, the focus has been on a variety of factors. The legal context, including the level of political rights and civil liberties, the type of electoral system, and the competitiveness of electoral politics explain some of the differences in voter turnout. Individual resources, like education, age, socioeconomic status and time, combined with motivation seem only to explain a minor part of the variation. The importance of ‘civic values’ learnt through the early socialization process has also been emphasised, and it has, for instance, been noted that ‘cultural attitudes towards the political system vary substantially across European states’. In this context it has, furthermore, been pointed out that political participation is a multidimensional phenomenon. Various forms of participation engage different individuals (Micheletti & Stolle 2004). This indicates that political consumerism is related to questions about lifestyle, etc., and is not just a matter of the individual political choice. To engage in political consumerism can also be a way to express one’s political identity.

Finally, there are approaches stressing the role of mobilizing agencies, referring to group networks, voluntary organisations and trade unions, social networks of families, friends and colleagues, as well as the role of the mass media. Mobilizing agencies seem to be important also when it comes to political consumerism. In a study on political consumers in Sweden, it was, for instance, found that the presence of environmental associations was essential by putting green political consumerism on the political agenda (Micheletti, 2003).

Conclusion

Taking into account the approaches to explain political participation, including political consumerism, we arrive at a comprehensive research agenda. From a comparative perspective, it seems especially important to consider the following aspects:

- the legal context concerning the issue of animal welfare as well as consumers, including formal authorities and government agencies, political parties and citizen participation;
- individual factors (like gender, income, education, etc.);
- political culture – which includes ‘the sense of national identity, attitudes towards oneself as participant, attitudes toward one’s fellow citizens, attitudes and expectations regarding governmental output and performance, and knowledge about and attitudes toward the political processes of decision making’, trust in government and/or government agencies;
- mobilizing agencies and public discourses.

8.3 ECONOMIC APPROACHES TO CONSUMER, FOOD, ANIMAL WELFARE CONCERNS

There are a number of theoretical frameworks that could be applied to consider consumer concerns about food animal welfare. Two broad areas of theory are of particular relevance in this context.

Utility theory

Utilitarianism is a widely used argument in ethical debate, including the debate about animal welfare. Utilitarianism is also a cornerstone of economic theory. It comes in many forms with a host of different extensions to the basic principle of ‘the greatest good for the greatest number’. Utilitarianism assumes that human happiness or satisfaction is the desirable outcome of human endeavour and that we should therefore seek the greatest happiness for the greatest number of people (for a discourse on utilitarianism and ‘human benevolence and sympathy to animals’, see Bentham, 1789).

In relation to consumers, economic theory uses the utilitarian principle that consumers purchase goods and services seeking to maximise their own utility (satisfaction or happiness) from consumption (see, for example, Marshall, 1920). Economic theories of consumer behaviour and choice assume that individual consumers have a diminishing marginal utility as they consume successive units of a particular product or service. Thus, consumers try to maximise their utility by consuming products that have the highest marginal utility relative to their price. For example, a consumer would maximise utility from the consumption of two goods *x* and *y* through the following

formula $MU_x/p_x = MU_y/p_y$ or $MU_x/MU_y = p_x/p_y$ (where MU_x or MU_y is the marginal utility derived from consuming good x or y, and p_x and p_y are the prices of goods x and y, respectively).

Concerns about animal welfare may reduce the utility that consumers derive from consumption of animal food products, whilst ‘welfare friendly’ food products may increase the utility derived from consumption. Moreover, consumers and other citizens may experience a disutility from the consumption by others of food animal products that they perceive to cause unnecessary suffering to animals (Bennett, 1995).

Lancaster (1966) puts forward an attribute theory of consumer demand. This theory states that goods can be decomposed into a number of attributes and that consumers derive utilities from the attributes that make up a good rather than from the good itself. Thus consumers have a willingness to pay for each of the attributes associated with the good or service in question such that the price of a good can be decomposed into prices for individual attributes. This theory can be applied to the animal welfare attributes of food products.

Transaction costs theory

Coase (1937, 1984) pointed out that there are costs involved in market transactions and that often institutions are a way of reducing these costs. Related to this concept of transaction costs are theories of contracts and trust. These may have particular relevance in the study of consumer concerns regarding food animal welfare. Transaction costs for consumers to purchase, and for food retailers to supply animal welfare friendly food products are relatively high. This is certainly true in terms of ‘search costs’ (Stigler, 1961) for animal welfare friendly food products. Thus, ways of reducing these costs need to be explored. These include, for example: (i) the provision of appropriate information, including product labelling (e.g. on the animal welfare attributes of food products); (ii) trust and appropriate contractual measures involving certification of products (e.g. food assurance); and (iii) the use of appropriate institutions and institutional and market arrangements (for example, bodies to monitor the welfare status of food animals, legislation and codes of practice to help ensure animal welfare friendly production practices, animal welfare assurance bodies, etc.).

8.4 A SOCIO-CULTURAL FRAMING OF ANIMAL WELFARE AND CONSUMPTION FROM FOOD MODERNITY AND ITS CONSEQUENCES

Several have claimed that contemporary changes in food habits represent a weakening of the structure of social norms which surround food, expressed as reflexivity of the relation to food, as ‘gastro-anomie’ (Fischler, 1990, 1997; Corbeau, 1996) and erosion and recomposition of food models and in terms of a transformation of forms of

legitimacy in the normative process (Poulain, 1997, 2001). Another feature is what has been termed as ‘medicalisation’, where the media turn to doctors who comment on certain aspects of daily life (like sexuality, scholastic failure, criminality), and where health becomes a societal value and the doctor gives a cultural discourse (Lupton, 1996). Medical norms are substituted for the social or moral norms of the eater, transforming the hierarchical approach to the act of eating: pleasure, sociability, health. Food is taken into account in the treatment of particular pathologies. Doctors themselves give nutritional counselling in the framework of a therapeutic relationship. ‘Nutritionalisation’ means that nutritional knowledge is diffused throughout society by the press, TV and government educational campaigns on health. The nutritional speeches are often changing and contradictory (science progresses by overcoming these contradictions). Human nutrition is very complex (biological, psychological and socio-anthropological) and ‘medicalisation’ implies socially isolates eaters and increases anxiety and culpability.

The questions which concern us are: How does an animal become edible? How does the animal enter into the food category? What keeps them there? What is the risk if we change the status of their classification? Two principal lines of thought can be followed: the organization of the rules of categorization (the law of proximity and the intricacies of classifying categories) and the societal mechanisms which legitimize killing animals for food. The question of the relationship between animal and man, and above all killing for food, has been the object of significant work in sociology and ethnology (Leach, 1980; Vialles, 1987; Fischler, 1990, 1998; Poulain, 1997, 2001).

The law of proximity and the principle of categorization

In order to be able to eat an animal, it must first be recognized as edible. There is a certain positioning within the system which classifies the animal species and the relations they have with humans. The symbolism of the animal’s inherent nature which defines its proximity to humans contributes to the decision as to whether to include or exclude the particular animal in the edible category. Animals can be arranged in four categories by understanding the distance which separates them from humans. We can distinguish ‘wild’, ‘game’, ‘domesticated’ and ‘pets’. To be edible, the animal must not be too close or too far away from humans. The two middle categories, game and domesticated, describe an animal as edible. The first and last category are fraught with prohibitions because they are either too far away or too close to humanity. Nevertheless, the borderline between the various categories differ depending on the culture (Leach, 1980, pp. 263–97). This is why the dog, the cat and the horse are edible in certain cultures and not in others. Using a similar approach, Mary Douglas shows that animals excluded from the edible category possess classificatory faults, which is to say that they don’t clearly fall in any single authorized category such as the horse which is in two categories (Douglas, 1970).

Noemie Vialles suggests looking at two significant aspects, which she calls ‘zoophagic’ and ‘sarcophagic’. For the zoophagic consumer, there is a clear distinction between animality and humanity. 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. Claude Fischler takes this idea a bit further by showing 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 animal. This is why English speaking people raise sheep and calves but eat mutton and veal. The French are undoubtedly less concerned by the 'sarcophagic' than Northern Europeans. Fischler's principal contribution is to have added the concept of incorporation. For him, the risk humans run in eating an animal is that they may become the animal which is similar to the sarcophagic concept. It is possible to distinguish two schemes of incorporation. The first deals with the risk of contamination and the second notes the dominant position of the eater who assimilates what is eaten without putting his own identity in question. This concept of incorporation brought to a larger level then becomes usable on an anthropological scale to identify types of societies which accept a large range of food as edible or have numerous food restrictions (Poulain, 2002, pp. 176–83).

The forms of legitimizing the killing of animals for food

The eating of animal flesh presupposes that the animal must first be killed and this cannot take place without taking some preliminary symbolic precautions. The way societies manage the killing of animals for food allows them to complete this approach in terms of categories by bringing to light their process of construction (Poulain, 2002). Three main situations can be noted: hunting societies; shepherd or farm raising societies which establish a privileged link with the domesticated animals; and neo-technical modern societies, which are of special interest to us here.

In order to understand the process of legitimizing killing animals for food, one must take into account the mythic and religious domains. 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 consists of killing the animals in a sacrificial framework. In numerous societal situations (the Greek world, certain ethnic proto Indo-Chinese societies) the animal is not killed to be consumed or rather not killed only to be consumed, but it is put to death in a ritual setting where there is communication with the world beyond. The explicit objective of putting the animal to death is not so it can be eaten but that its death serves to set up a relationship with the spirits, or the Gods, beings from the world beyond hoping to garner favours or forgiveness by offering the slain animal to the deities. The sacrifices are always accompanied by sharing rituals which are more or less sophisticated, in the context of reciprocity, which weave the social links and allow the spreading out of the responsibility for the killing throughout the entire society. According to Roberson Smith, the fact of eating the sacrificed victim together establishes substantial links between the members of the tribe.

In pastoral or agricultural/breeding societies, the domestic animal is often used with divine authorization. In monotheist religions, God's authorization makes it possible for man to kill an animal for food. In the Judeo-Christian tradition, after the fall from paradise, the authorization to consume animals is explicitly given to Man in the opening of Genesis. One should not confuse the current practices of putting animals to death in the Jewish domain with a sacrificial practice. The authorization to kill is accompanied

by a complex categorization of the order of what is edible with a series of food prohibitions. The method used for the killing of animals for food in Islam was inspired by Jewish law. The slaughter is carried out according to a precise ritual. In order for the meat to be considered 'halal', the presence of an Imam is not obligatory as long as the person who performs the slaughter is a Muslim and, at the moment when the animal's throat is cut, the person pronounces the name of God, 'Allah'. In Islam, we find the same taboo against the consummation of blood as well as the categorical prohibition against pork. The function of these rituals is to 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.

All of these symbolic gestures help to better manage the relations between humans and nature in the vegetable/animal domains and define humanity's place in the order of living things. What is taking place in our modern society? How does our society transform this act? Is the act of killing performed through a mixture of rationalizations and what impact do these rationalizations have on society? What is the impact of the neo-technical organization of slaughter which tends to disconnect us from the ties which bind the eater to the animal?

The crisis of legitimizing the killing of animals for food

In Western societies, the killing of animals for food, performed under the non-religious or lay domain, is due to Christian influence. Animal production is particularly significant of the modernity of foods. Conceived under a Taylorist method, even if this model is profoundly rejected in the sphere of the organization of human productive activities, it contributes to a 'thingification' of the animal destined to be eaten. 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). The process of Taylorisation of the slaughter itself seems to have a double function. The first is to dilute the responsibility for killing and the second is to follow through and reduce the animal symbolically down to just a piece of meat, to dignify it (Vialles, 1987).

Through a sort of paradoxical compensation, the living animal in its 'natural state' finds itself personified and anthropomorphised. Stealing the lead roles as movie stars, animals now give us lessons in natural ethics. These transformations of the relations between humans and animals also result in the development of certain new areas of research of scientific knowledge. A discipline like ethology, which brings to light the complexities of animal behaviour, contributes to the transformation of the modern image of the animal which is imbued with intelligence and capable of feeling emotions. The consequence of this personification is that pets revel in their particularly elevated status and become the object of exorbitant attention. They literally become part of the family. We find here the phenomenon of identification between the pet and humans and a projection of human needs onto the animal.

This phenomenon of ‘personification and thingification’ which could appear at first sight as the prolongation of the phenomenon of repressing the presence of the body and the spectacle of dead flesh, identified by Norbert Elias as the driving force behind ‘the civilizing process’ and, undoubtedly more fundamental, as a sign of the difficulty in dealing with the killing of animals for food. This phenomenon has turned the perception of modern humans’ place in nature and the natural order of the animal species completely upside down. The current ‘mad cow’ crisis is a revealing case in point. Taking a broader approach, this can also be seen as a crisis of trust in the values and capabilities of science in lay societies to adequately and acceptably manage the killing of animals for food consumption.

8.5 SOCIOLOGY OF CONSUMPTION

For a long time, consumption studies dealt with a specific set of issues, such as the social effects of conspicuous consumption, the impact of manipulative marketing techniques involved in mass marketing, the domination and social distinctions established by groups and social classes through their possessions and cultural competences. In the 1980s, most of the negative connotations were substituted by a new interpretation of the consumer as an active, creative and self-reflexive actor. This was reflected partly in Bourdieu’s work on taste and consumption activities as modes of social distinction, partly in a series of studies that have been put under the common heading of ‘post-modern approaches to consumption’.

Most of the ‘post-modern’ approaches to consumption addressed new issues such as dreams (Miller), images and pleasure (Slater, Rojek) associated with consumer culture, the creative potential of mass culture and the apparent collapse of the boundary between high and popular culture (Gottimer, Lury, etc.). These studies interpret consumption as a new arena for identity formation and point to the decline of other more traditional sources of identity (Maffesoli, Lupton). They also share conceptualisations of industrialised societies as characterised by a growing degree of individuality (Bauman, Giddens, Beck) and freedom of choice and expression.

Thus, the debate in the sociology of consumption over the last two decades has been dominated firstly by the theme of consumption as communication and, secondly, by its contribution to the creation individual identity in a context where a ‘consumer ethics’ has replaced a previously existing ‘work ethics’ (Bauman, 2001). Consumption now becomes more than just the pursuit of use-values or a claim to social prestige: it is also deeply associated with the sense of self and personality, and a growing number of studies support the thesis that in contemporary Western societies a person is likely to be defined in terms of lifestyle or form of belonging to a group or, better, a post-modern tribe rather than in terms of either class belonging or personal qualities. In this approach, identity is defined as an interminable project, involving not only crucial life-choices and decisions but, equally, their translation into a narrative, a life-story.

According to this interpretation, individuals are increasingly obliged to choose their identities (Warde, 1994, p. 878, italics added). This being the case, it has been suggested (for instance by Bauman) that consumer choice may become a major source of personal anxiety, since the individual is now responsible for his or her choices, so for his or her mistakes. This 'production model of the self' implies that the acquisition of goods and services has become central to personal psychological well-being. It is no longer just that certain special objects give people a sense of security and satisfaction; rather, it implies that attempts at personal self-development and self-growth increasingly entail constant consumption. To the extent that people can, relatively freely, re-design their selves by purchasing new outfits and forming new associations, then, a high level of demand for new, or rather different, goods is likely to pertain.

More recently, however, Alan Warde (1996) has criticized those approaches that stress only the glamorous, self-identifying aspects of consumer culture. He has argued that other sources of identity, particularly those associated with national, ethnic, occupational and kin groups remain strong. These forms of identity are not dependent upon shared patterns of commercial consumption. Thus, he suggests that the 'production view' of the self overemphasises the role of cultural products (particularly media outputs and icons of fashion) at the expense of the variety of practices which create and sustain social relations of kinship, friendship and association. Consistent with this criticism, Gronow and Warde claim that the debate on consumption has neglected practices of 'everyday food consumption' or the 'use of water and electricity, organisation of domestic interiors and listening to the radio' (2001, pp. 3–4).

Food consumption: the de-hierarchalization of tastes, distinction and omnivorousness

Food and drink have been widely used as symbols of social position and status in sociological analyses and thus have had a high profile in consumption studies. Bourdieu's strong emphasis on clear distinctions in taste and lifestyle based on class has more recently been criticised by several authors. The diminishing role of class in explaining food consumption is underlined, firstly, in studies that point to the evolution of food consumption models towards a common standard.

Historical analyses of the evolution of food consumption in Europe (the developmentalist approach) suggest that patterns of food consumption tend to run across rather than with the grain of class. The diminished descriptive role of class in describing the variation emerging in food practices is also evident in studies of contemporary societies that underline a growing fragmentation in the world of food consumption, brought about by the growing sophistication of food tastes (omnivorousness, cosmopolitanism – Warde, 2000). These considerations are relevant in the analysis of contemporary trends in the field of food consumption, in particular in the growing nichification and fragmentation of qualities in food products.

Market sophistication and its effects on ethical/ political consumption

Warde underlines that one of the main features of affluent European contemporary societies is the enormous increase in the variety of the commodities and services in the field of food. He believes this phenomenon has important consequences; in particular, it becomes hard to read the signs of social and aesthetic classification when there are too many cultural items on display, because the proliferation of variety makes aesthetic judgement and the detection of a cultural hierarchy more difficult (Warde, 1997). The same applies to the case of ethically labelled or presented products.

According to recent research, especially in the field of marketing, information about ethical and unethical actions has an asymmetrical influence on attitudes, such that vices detract from attitudes more than virtues enhance them. Thus, one might expect consumers to punish unethical behaviour, but not necessarily reward ethical behaviour. It has been suggested that many people believe there is a responsibility not to harm (e.g. not to use child labour), but do not automatically believe that others have a right to be helped (e.g. provide education for under-age workers, support producers 'in conversion to organic farming', support the fair-trade networks, and so on – Miele et al., 2005).

The study of consumers' concerns about farm animal welfare and their requirements of information need to address the issue that food consumption is largely characterised by routines and taken-for-granted or un-reflexive practices. Moreover, it needs to address the issue that for those practices of food consumption more explicitly invested with reflexivity (e.g. ethical consumption, political consumption and alike) in Europe the market of food is highly sophisticated and characterised by a multitude of aesthetic and ethic signs, often perceived as contradictories.

8.6 ANIMAL WELFARE AND CONSUMPTION: A SOCIAL AND INSTITUTIONAL PERSPECTIVE

In modern societies food consumption is typically separated from food production, and very few will have any direct experience from or control over the treatment of livestock. This division of labour between social institutions implies specialisation of knowledge, complex organisation and division of responsibilities (see e.g. Fine, 1998; Harvey et al., 2001; Warde, 1998). The habitual character of food consumption practices, as well as qualities of the relations to other actors, have implications for consumer involvement in animal welfare issues associated with food.

The institutionalisation of consumption

Among the abundance of foods offered we are forced to select between them. But we cannot reconsider our decision each time we purchase milk or meat, nor can we choose something that is not on offer. Rather, most often we buy 'the usual thing'. Food related practices, as part of everyday life, are usually very routinized. Everyday routines are neither explicit, individual acts of decision-making, as assumed in cognitive approaches, nor are they mere unconscious, pre-determined acts (Gronow and Warde, 2001). Routines normalize practice, they are the 'way things are' done (by 'us' if not by 'them'), but they are also 'the ways things should be done'. Strongly normative, routines are the consequence of social interaction and are embedded within social institutions. The configuration of food consumption varies in time and space, also shaped by (and shaping) the specific context formed by the food provisioning system. These configurations and social settings have impacts on relations and priorities by affecting the daily routines, the directions and priorities of food consumption as well as the responsibility, power and resources of the consumer in society. This understanding of routinized and normatively regulated practices does not preclude agency or strategic considerations. In some situations, routinized practices become explicit and contested, there can be an intermittent break-up in the routines – an exception, or new and alternative, often ideologically justified, habits may be established – often gradually again to become tacit and taken for granted (Swidler, 1986). But the institutional framing is important for understanding consumers as social actors, where the socially embedded consumer role may form the foundation for varying forms of voice, mobilisation and collective action, as well as influencing the reference to consumers in broader political alignments.

A relational perspective and the role of trust

We depend on others to supply us with food. But the interactions with them will expose us to uncertainty with regard to a number of issues and aspects. Food is a basic necessity, but potentially a serious health hazard. Moreover, food is very important as part of our everyday lives, thus bringing up a number of other issues, such as those related to quality, taste and economy, as well as a number of normative and social issues related to proper conduct, including fairness, cultural values, animal welfare, concern for the physical environment, etc. Uncertainty may be associated with all of these aspects. Any market exchange between suppliers and consumers is characterised by asymmetries of power and information, but also by mutual dependency. The suppliers' incorporation of considerations for consumer expectations and the risks that consumers have to take is challenging. 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.

For the consumer, interaction in a situation of uncertainty and risk, where there is no way to control the situation entirely, where the outcome is not fixed, and information is incomplete, there is a need to trust (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. Trust can therefore be the simple reliance on the ordered workings of existing institutional arrangements (Seligman, 1997, p. 25). Reputation, based on the iteration of ordinary activities, becomes the basis for new or enforced expectations and hence for confidence in the system of interacting activities. However, trust relations will also be relevant, perhaps even more so, when this implicit and tacit mutuality of norms and expectations is not established, either because norms and expectations are not shared or because the acts, the character or intentions of the other cannot be confirmed. In contemporary societies, trust in unknown others is a central issue. In these cases, the situation is more open, with more uncertainty, but also greater degree of negotiability.

Ongoing changes in the European food sector have features that may both strengthen and challenge the foundations of trust. Integration, management systems, and technological innovations can improve predictability and efficiency, thus supplying foods with a lower price, predictable quality, wider variety, and lower risks for unintended safety hazards (Guseva and Rona-Tas, 2001). At the same time, many of the changes imply shifts in power and distribution of responsibilities, such as integration of markets along the food chain, more concentrated ownership structures, global sourcing, etc. (Lyon, 1998). The number and types of economic agents involved in interdependent exchanges is large and changing, including different types of retail outlet, food processors (branded and supermarket own-label), distributors, logistics, packaging, marketing, seed manufacturers, farmers, agricultural services, biotechnology, auditors, marketing consultants, and so on. The complexity of technologies and provisioning systems has also increased the asymmetry of information immensely. From a consumer perspective, these changes may cast doubt on whether they will actually benefit from increased economic efficiency, whether the actors take due consideration of consumers' interests with regard to uncertain and controversial safety hazards or quality claims, and how profitability concerns are balanced with concerns for consumers' health and nutritional status. Openness, uncertainty and negotiability with regard to the normative references for trust are even more evident when wider social issues are being brought up, such as consequences of globalized markets for third world farmers, or the welfare of domestic animals.

Particular institutional solutions are needed to ensure and demonstrate predictability and adherence to shared norms and expectations. A number of efforts made by corporate market actors can be perceived as serving such functions, such as branding and labelling, traceability, declarations of corporate social responsibility, etc. However, the problem of showing 'the good intentions' and acceptable performance is particularly the point where other institutional actors are being involved, such as control bodies, interest organisations, experts, and the media. Market arrangements as well as third party audits and public involvement can provide a basis for considerable generalisation of trust relations and, in turn, for routinization of consumption. These relations are institutionalised in different ways in different countries and for various food items and issues, referring to specific normative expectations and social distributions of responsibilities. Problems seem to arise when consensus is not obtained and when the various actors involved systematically fail to meet expectations.

Consumers and animal welfare

Animal welfare in food production is handled directly by people involved in livestock production, in transportation and slaughtering of animals. In Western societies, these activities are closely monitored and regulated. In general, people's engagement in consumption activities takes place spatially clearly separated from the animals and from those who treat the animals. Any consumer activity with reference to animal welfare will therefore depend on indirect relations and the involvement of other actors. These other actors include the multiplicity of actors in the food chain, in knowledge production and communication, in social and political mobilisation, and in regulation of food production and distribution. Moreover, this complexity implies a generally large bias in the distribution of knowledge and resources.

From a consumer point of view, the handling of animals and the slaughtering process involve basic norms and beliefs related to socially acceptable ways of treating animals, the killing of animals, and their transformation to foods and dishes for consumption. Cooking and eating practices represent habitual, tacit ways of handling uncertainties and dilemmas involved in the preparation and eating of food, including those associated with animal welfare and slaughtering. At the same time, consumption routines are formed by complex interrelations between structural constraints on the consumer and the supply side, the division of labour and the distribution of responsibilities and power between social actors, and norms and beliefs concerning food consumption as well as animal welfare. People's agency, either through their shopping practices or by consumer related claims-making in public and political arenas, will be framed and influenced by such conditions.

IMPLICATIONS FOR THE WELFARE QUALITY PROJECT AND CONSUMER STUDIES

9.1 APPROACHES EMPHASISING DIFFERENT ASPECTS OF CONSUMPTION AND ANIMAL WELFARE

The presentation of various perspectives on consumption and animal welfare has demonstrated the multi-dimensionality of the issue, both in terms of the understanding of animal welfare from a public and, in particular, a consumer point of view, and in terms of changing and varying conditions for how animal welfare is being dealt with as framed by the consumer role. By emphasising different aspects of consumption processes, these approaches help to identify various structural and institutional conditions that may influence consumer views on animal welfare and how these concerns are reflected in consumption practices.

Consumption may be seen as representing an arena for ethical considerations related to animal welfare issues. We argue for a deliberative approach, emphasising human-animal relationships, so-called practices, in which the care for animals may vary. Each practice involves different stakeholders, rules, standards, and values. In this ‘pragmatist’ approach, these practices should be considered before going into any detailed ethical argumentation and decision-making. Ethical dilemmas and value conflicts are addressed through discourse and various forms of consultations, including not only public debates, but even focus groups debates, etc.

Socio-cultural theories focus on rules of categorisation which make animals edible and on societal mechanisms which legitimise killing animals for food. It is suggested that in contemporary societies, there is a significant difference between ‘zoophagic’ and ‘sarcophagic’ forms of classification. While the first assumes that animality and humanity are different entities, the second involves more ambivalence and requires that meat for food is actively distinguished from animals through different vocabularies. Killing animals for food cannot take place without taking some preliminary symbolic precautions. Modern slaughtering is characterised by scientific, Taylorist methods which tend to de-animalise the animals. At the same time, we find tendencies of personification and anthropomorphism of live animals like pets, together producing considerable ambivalence and tension in the treatment of animals.

From a political science point of view, animal welfare represents an issue for political mobilisation and participation. While participation through conventional political channels seems to be declining, recent research has focused on alternative forms of mobilisation, including consumption, as a form of 'individualistic collective action'. In order to explain political participation, including political consumerism, in a comparative perspective, it is important to consider the institutional context and political culture, as well as individual factors, mobilizing agents and public discourse.

A cornerstone of economic theory, utility theory focuses on utility maximisation. 'Welfare friendly' products may increase the utility derived from consumption. Moreover, goods may be decomposed into a number of attributes from which consumers derive distinctive utilities, animal friendliness representing such an attribute. Consumers are assumed to have a willingness to pay for each of these attributes. But animal friendliness will also involve costs. Transaction cost theory emphasises the need to reduce transaction costs through a range of measures, including product information and labelling, trust and contractual measures, and appropriate institutional arrangements.

A marketing perspective will focus more on the consumer side, first and foremost on the distinction between different consumer segments, characterised by varying food choices and preferences. Hierarchies of food choice motives are assumed to be based on stated preferences and underlying values and referring to distinctions between product attributes.

From being concerned mainly with processes of individualisation, sociological theories of consumption have in recent years focused more on how increasing diversification and uncertainty is not a matter individual choice of identities, but is rather influenced and structured by social relations and material conditions. This does not necessarily mean a reproduction of class and taste distinctions. Increasing variety, implying also omnivorousness of consumption, makes it more difficult to read signs of social and aesthetic classification and detect cultural hierarchies. Information about ethical and unethical actions (referring for example to animal welfare) seems to have an asymmetrical influence on attitudes, such that vices detract from attitudes more than virtues enhance them.

However, consumption activities may also be seen as representing institutionalised practices. Consumption practices refer to a range of roles and perspectives – as shoppers and eaters, but also co-producers, media users and citizens, and represent relatively stable habits formed within normative and institutional frames. Food purchase is a key for understanding the relational nature of food consumption, heavily routinized, but also providing potential agency. Purchasing practices with reference to animal welfare may be influenced by conditions on the consumer side, characteristics of the supply and the political and regulatory context, as well as features of the relation in terms of the distribution of responsibilities, trust, etc.

9.2 HOW CAN VARIOUS PERSPECTIVES HELP US UNDERSTAND CHANGE AND VARIATIONS?

Taken together, these approaches provide a wide set of dimensions for understanding variations and change. Two types of references may distinguished: those referring to structural factors, and those focusing on particular actors and institutions with agency to influence practices or processes of consumption. The actor level is represented by individual actors, in particular the consumer, as well as collective actors.

Figure 9.1 illustrates the distinction between structural and actor/agency level factors in analyses of practices and processes of food consumption.

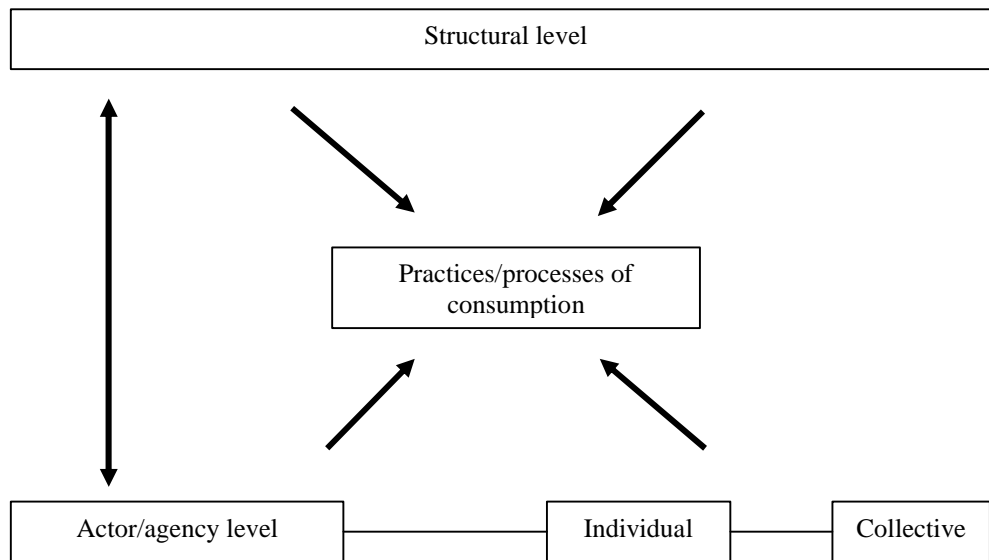


FIGURE 9.1 A possible framework for understanding consumption practices for use in the comparative analyses of consumers and animal welfare.

It is suggested that these two levels cannot be viewed in isolation, but must be understood as interdependent, actors and agents both influenced by and reflecting structural conditions, on the one hand, and with the potential ability to do something that will change structural conditions, on the other. This distinction is important in order to identify different sets of theoretically founded explanations to various outcomes in terms of consumer practices referring to animal welfare, but it will not always be easy to keep the two levels separate in the empirical analyses. Moreover, while some of the presented approaches concentrate on one level of analysis, there are also several which emphasise how structural change is expressed through the agency of individuals and various institutional actors.

The research questions and the design of the Welfare Quality project are formed mainly within the frames of an actor level analysis of the role of consumers. The attention is

directed towards what people think, wish and do, first of all in their role as consumer, to support and improve animal welfare. Moreover, the aim is to identify barriers and potentials in terms of what other actors can do to promote consumer involvement. Previous research, as reflected even in the country reviews, do, however, underline the need to consider basic structural factors in a comparative analysis aiming at identifying factors that can explain variations in consumer involvement in animal welfare.

First, food consumption practices cannot be regarded in relation to practical and immediate concerns. Ethical considerations associated with animal welfare and culturally founded symbols, norms and rituals associated with killing and eating animals represent basic frames of reference for our ideas and practices in terms of our relation to live animals and who should be responsible for their well-being, on the one hand, and how killing animals for food is legitimated and the classificatory systems that make animals edible, on the other. Such considerations will have a fundamental influence on our use of foods of animal origin and for the responsibility that we take on as consumers. Depending on the approach, tensions and changes may be framed in terms of ethical dilemmas and value conflicts or as classificatory ambivalences and uncertainties. It has been emphasised that rather than seeing these practices and processes within the frames of individual concerns, they should be understood in terms of social processes, to the gradual formation of social norms and classifications and, in certain cases, to negotiations on more specific dilemmas or conflicts.

Several of the presented approaches suggest that variations in the social handling of such basic dilemmas and ambivalences may be explained by differences and changes in societal institutions, including the structure of food provisioning systems, political culture, the structure of the household institution, gastronomic culture, and knowledge systems. It has been suggested that ongoing changes at this level will have consequences for our relation to animals, the use of animals as food, and animal welfare emerging as a social problem. For example, changes in breeding and slaughtering systems seem to reflect a secularisation and 'thingification' of our relation to animals for use as food. At the same time, live animals tend to be more personified. Together, such processes may produce considerable tension and uncertainty, potentially leading to various forms of vegetarianism.

But of equal importance within our context is the influence of structural change on the consumer role. Contemporary systems of food production and distribution have been characterised as moving towards increasing complexity, dynamic, and market actor dominance, on the one hand, and standardisation and institutionalisation of relations (in terms of information, contracts, monitoring, responsibilities, etc.), on the other. Together, such processes may have considerable impact on what is actually on offer in the market as well as on consumer agency. For one thing, the immense variety of products, product attributes, information and symbols will open for more consumer choice and, in some respects, also for consumer agency. But several have pointed to how this variety and choice is accompanied by increased uncertainty (and potential anxiety) concerning basic categorisations of food and evaluations of risks as well as interpretations of symbols and social distinctions. Similarly, changes in political culture and political institutions seem to lead to new forms of political participation and mobilisation, in which public involvement in animal welfare issues in their role as

consumers represents an emerging form of participation characterised as ‘individualised collective action’.

These structural conditions will form a context and a frame for the role and involvement of various actors and for consumer priorities and practices, thus providing important explanations for variation and change. It will, however, not be easy to capture such variations directly within the context of this study. We can, to some degree, make use of earlier contributions about country variations and temporal shifts as interpretative frames for our own analyses. Moreover, the studies of producers, distributors and consumers can provide valuable information about country specific patterns and configurations which can indicate basic differences at a structural level. For that purpose, country-wise analyses of the three parts of Subproject 1 may be useful.

At an actor level, considerations among individual consumers in the various countries are at the focus of attention in the consumer study, as seen both from economic, social, ethical and political perspectives. Consumers may also represent a collective actor, appearing through various forms of mobilisation. Moreover, relations between (individual/collective) consumers and other actors have been emphasised as important for analyses of consumers and animal welfare. Other actors include various market actors, authorities, political institutions, experts, mass media, NGOs, etc. A key notion seems to be what can be termed as ‘institutionalised responsibilities’ – that is, who can be expected to do what for animal welfare within a certain institutional setting. Consumer agency may be seen as one element of such institutionalised responsibilities, including consumer responses to ‘vices’ and ‘virtues’. A number of conditions characterising the specific relations between consumers and market actors have been presented, including the actual provision of products and information, contractual measures, institutional arrangements to monitor and regulate (by market actors, independent agencies and public authorities), and trust. These relations – and the distribution of responsibilities – may also be influenced by mobilising agencies and by public discourse.

It must be emphasised, however, that consumer agency and practices are not influenced only by norms and expectations regarding who ‘ought’ to take responsibility or by their own priorities, but also by the actual performance and reliability of other actors, especially of those in direct control, the various market actors and the authorities. Consumer agency and involvement should, therefore, not be analysed solely in terms of individual or collective mobilisation for a common good cause, but may as well represent a voice of protest and distrust as to what other actors do. Consumer dissatisfaction and distrust may, in some circumstances, lead to passivity and non-involvement and, in other circumstances, to active engagement, if not necessarily in ways that other actors appreciate.

Individual actors may be analysed directly, but most approaches in this study point to a more aggregate level of analysis, comparing different countries, different chains of food production and distribution, etc. The impact of configurations of institutional actors for consumer agency may be analysed by bringing in information collected through the country reviews, the work undertaken in the other work packages of Subproject 1, and

Subproject 2, and through consumer studies in terms of their interaction with and views on other actors and on their own role.

9.3 ITEMS FOR FURTHER STUDY

The main reference for the empirical studies in WP 1.1 must be the outcomes that can be observed in terms of consumer beliefs and the role consumers in improving the welfare of farm animals, and practices in terms of purchases and consumer voice. We already know that when prompted, most people will agree that the welfare of animals is important. Popular involvement in the role as consumers is however very limited in most European countries. The questions are therefore:

- How is animal welfare defined and how does it relate to food items and to consumer issues?
- Why are there gaps between concerns and actions?
- What are the basic dilemmas involved, ethically and in practical everyday life?
- What are the most important barriers to change at an agency level?

Assuming that structural and actor level conditions can provide important explanations to such questions, the approach is to compare various European countries, acknowledging that outcomes as well as conditions vary considerable between the countries.

The following items are meant to indicate types of explanations, as expressed in comparative analyses between countries. On the bases of the outline of various theoretical approaches and the framework suggested above, a number of themes have emerged. The following items have been derived from the discussion at the project meeting in Florence, as reflected in the minutes from the meeting. The themes have, however, been slightly reorganised according to the framework presented above. The list is very long and opens up a large variety of research questions and analyses. Some prioritisation may, therefore, be needed, depending on the types of empirical material that can be collected within the frames of this work package (focus group interviews and survey), through other parts of the Welfare Quality project or through other available information.

Structural conditions

The structure of the food chain

- Systems of food provisioning (organisational frames, practices and performance).
- Regulatory frameworks (legislation, enforcement).
- Animal friendliness in the food supply (availability, price, standards, labelling, monitoring).

Demography

- Immigration (and its impacts on culinary food culture and animal welfare concerns).
- Culture.
- Religion (especially religious laws prohibiting consumption and providing guidelines for animal slaughter, e.g. halal and kosher products).
- Socio-demographic factors (family patterns, gender division of labour, education, class, generations, rural/urban).

Culinary food culture

- Cooking and eating practices.
- Institutional level and household level.
- New technologies, science.
- Health.
- Embodiment.
- Identity.
- Vegetarianism – eating practices, political mobilisation, trust, as the avant-garde.

The political structure

- Political culture.
- Political institutions and animal welfare issues.
- Patterns of political participation.

The relations to and understanding of animals

Animals

- Different sets of human-animal relationships, e.g. eating animals for food, keeping animals as pets, and hunting for animals.
- The ethical status of animals (eco-centric perspectives view animals as subjects (on a par with humans) but anthropocentric perspectives view animals as objects).
- Variations in ethical status across different animal species, e.g. tuna versus dolphins, cattle versus sheep, dogs versus snakes, etc.

The discourse on animal welfare

- How do consumers define animal welfare? How do they frame animal welfare issues?
- Different ways of legitimising animal welfare.
- How do consumer concerns vary in relation to different species and different specific issues?
- Reflexivity.
- New technologies.
- Mobilisation on animal welfare issues.

Characteristics of the relations between consumers and other actors

Power and Influence

- Powerful actors.
- Ideological hegemonies, who are defining the issues, the problems and the solutions.
- The role of consumers in animal welfare issues, consumer agency in relation to and in interaction with other actors.

Responsibility

- Which specific actors should be responsible for animal welfare?
- What are the criteria for determining responsibility?
- The relationship between power and responsibility.

Trust (and distrust)

- How consumer trust varies between different actors.
- What are the criteria for determining trust?
- Information and trust.
- Trust/distrust in relation to consumer practices (purchases, voice).

Information

- How do people know? (What sources of information do people use to find out about animal welfare issues?)
- How specific/explicit is the information provided? (For example, is animal welfare information presented in its own right or as part of a slightly different set of concerns, such as organic foods.)
- Labelling.
- Do people want to know? (Do certain consumers deliberately avoid information relating to morally challenging issues, so that they do not have to make difficult moral decisions relating to their own consumption habits?)

CONCLUDING REMARKS ABOUT THE THEORETICAL FRAMEWORK

The aims of this part of the report were to get an overview of relevant theoretical approaches that can help us understand public concerns for animal welfare and how this relates to the consumer role. The country reviews reveal that while knowledge status is highly variable, some observations can be outlined. First, it seems that there is a long-term tendency of growing concern for animal welfare associated with changes in modern food production and even more basic changes in the relations between humans and animals. But this concern, and concerns for farm animal welfare for food production in particular, seems to be framed in very different ways in various countries. Some consequences are that implications for social mobilisation and for people's daily practices in the role as consumers, is variable. Moreover, more short-term responses to events like food scandals differ from no response at all through temporary shifts in demand to impacts on long-term consumption patterns.

The contributions to this report have, therefore, focused on possible explanations for the variations between countries and temporal shifts in public concern and consumer practices. A number of very different approaches have been presented. To some degree these are complementary and will form alternative ways of analysing the empirical data. It is evident that we cannot go into detail on all aspects. Nor can we focus on all elements in people's relations to animals and animal welfare. We will have to concentrate on the association between public animal welfare concerns and consumption practices. This, on the other hand, will require consideration of a rather wide set of factors. It is, however, possible to outline some basic factors that seem of importance. A distinction has been made between structural explanations and actor or agency types of explanations to variations in opinions and practices. At the structural level, factors related to food production and the food market, culinary culture, political culture and institutions, socio-demographic conditions, and also religious and ethical dimensions have been pointed out. At the agency level, characteristics of relations between actors have been emphasised, including divisions of tasks, responsibilities and duties, power relations, conditions of trust, and exchange of information.

A main challenge in the empirical tasks in the consumer study seems to be to make certain that there is sufficient empirical material (in WP 1.1, in Subproject 1, in other parts of the Welfare Quality project and with secondary data) to allow thorough and

comprehensive analyses of the central dimensions outlined. It is, therefore, of central importance that the links between the theoretically founded perspectives and plans for data collection are further elaborated through active involvement of all project partners. The country reviews and the development of the discussion guide for the focus group interviews represent the first steps in this respect.

Another challenge is associated with the variation in social and institutional framing of animal welfare issues. We already know quite a bit about this in some countries, less in others. But, still, these variations must be carefully considered, in order to make the questions both relevant and comparable and to capture central dimensions to explain country variations. This is particularly demanding since important structurally linked factors may be taken for granted and not thematised within each country setting.

PART II

A COMPARATIVE ANALYSIS OF RETAIL STRUCTURES IN THE SIX COUNTRIES

edited by

Jonathan Murdoch

Cardiff University, United Kingdom

INTRODUCTION TO PART II

The overall aim of this comparative report is to show how retail structures vary across the six study countries – France, Italy, The Netherlands, Norway, Sweden and the UK. This comparison can help to show how varied national retail structures shape the European market for welfare friendly products. This work should set the scene for later tasks in this Work Package (i.e. the market audit and the assessment of retailer strategies and attitudes to animal welfare) and also provides background material for tasks in the other Work Packages of SP 1, those on consumers (i.e. it helps explain the market situation confronted by consumers in the differing study countries) and producers (i.e. it helps show the types of relationships that are likely to frame production decisions in the differing national production contexts).

The report will describe the most significant features of the various retail structures and associated features and then will aim to draw out some general implications of relevance to the Welfare Quality project as a whole, in particular, for the other Work Packages in SP 1. The first point to note is that the presentation of the study countries will follow the twin criteria of retail concentration – that is, market dominance by a few, large retail companies – and market closure – that is, the extent to which retailers are still reliant on national rather than international systems of provisioning. Concentration is a ubiquitous phenomenon and most European countries show signs of increasing dominance by large retail firms or chains. Yet, as we shall see, there is still some considerable variation in the degrees of concentration to be found in differing national contexts and it is important that this variation is recognised. It is also important to question whether all national systems are on the road to the same concentrated outcome. There is even more variation when it comes to market closure and again no one model should necessarily be seen as dominant. Some countries have very open, internationalised retail systems; others have relatively closed, nationally specific systems. The openness or closure of a national retail system has differing causes: in some countries it is due to (the legacies of) protectionism whereas in other countries it is due to regionalised or localised consumer preferences.

In what follows, the interaction between concentration, fragmentation, openness and closure will be considered. We begin with the concentrated and closed retail system that exists in Norway and move on to the slightly more open but still concentrated system that exists in Sweden. Then we go on to consider the concentrated but relatively open systems that can be found in The Netherlands and the UK before concluding with the less concentrated but slightly more closed systems that exist in France and Italy. The meanings of ‘concentrated’ and ‘closed/open’ will be explored further in the conclusion.

NORWAY

Norwegian grocery retailing is highly horizontally concentrated, with four groups accounting for 99% of the regular market (AC Nielsen, 2004). In 2003, this market comprised 4,295 active grocery shops and had a total turnover of 97 billion Norwegian Kroner (NOK) (AC Nielsen, 2004). Offering a more inclusive definition of the market, F. Andhøy AS (2003) estimates the main retailers' market share in 2002 to be 82% of a total grocery market of 113 billion NOK (this includes includes 4800 kiosks and gas stations, 15% of total turnover, and 1600 speciality shops in food and drinks, 3% of total turnover). Measured as a percentage of total wholesale procurement of agricultural produce, retailers accounted for 84% of the market in 2001 (Kjesbu et al., 2003:5). The remaining 16% went through the HORECA market. This is predominantly Norwegian produce. In 2001 there was a combined retail and HORECA turnover of Norwegian produced agricultural products of 51.4 billion NOK. For fresh meats and fresh milk products, the imports were almost negligible.

While these figures imply that the Norwegian retail system is concentrated and closed, it should be noted that each of the Norwegian retailers is becoming increasingly integrated into European retail strategies through partnerships with foreign firms. Until recently the foreigners had all been 'invited in', mostly to play passive roles as financial investors. This seems now to be changing, as the number two group, ICA Norge AS, was recently acquired by the Dutch firm Ahold (ICA Norge currently holds a market share of 23.6% of the total grocery shop market). At the same time, the German discounter Lidl entered the Norwegian market. Lidl plans to open somewhere between 40 and 50 stores all over southern Norway. This is the first 'uninvited' retailer entry into the Norwegian grocery market, and it holds the potential to change the strategies of all the major players.

The other three retailers are all owned and controlled by Norwegian actors. Norgesgruppen AS is the biggest retailer, with 34.7 percent of the market (AC Nielsen, 2004). It is still controlled by a major wholesaler (Joh Johansen), yet its behaviour is that of a conventional retailer (Jacobsen and Dulsrud, 1994). However, it should be noted that Norgesgruppen has recently reached an agreement with the French retailer Carrefour, which will allow the Carrefour's format, Champion, to be opened in Norway. Norgesgruppen will also be allowed access to Carrefour's product range and system of procurement. Another of the large retailers, Coop Norge, has also recently joined with Swedish and Danish counterparts in Coop-Norden AB, to form the second biggest retail chain in Scandinavia. The aim is to centralise procurement at a Nordic level, and to streamline the distribution and shop formats across national borders. Yet, the Coop is

still a rather slow moving organization, and the amount of coordination at the international level has so far been modest. The last group, Reitangruppen, is the fastest growing Norwegian grocery retailer. It is also unchallenged as the most cost effective retailer, measured in terms of turnover per m². Currently it holds 17.4 percent of the market for its REMA1000 shops, a soft discount format. It is also involved in convenience shops and kiosks in all the Nordic countries and aspires, via a strategic agreement with the German retailer Edeka, to enter into the German market with its 7 Eleven format. REMA1000 is also well established in Sweden, Denmark and Slovakia.

To date, the dominant retail format in Norway has been 'soft-discount'. These are shops with a relatively restricted number of product lines and no fresh, non-packaged foods, except for a limited range of fruits and vegetables. Marketing is predominantly focused on price. All four retail groups run such formats, accounting for more than 50% of the total grocery market (ACNielsen 2004). In terms of size of stores, just less than half of them (48%) are 400–999 m². Big supermarkets (1,000–2,499 m²) account for less than a fifth of the market (19.5%) and hypermarkets (> 2,500 m²) for about 5% (AC Nielsen, 2004). This dominance of a one-store format implies a low degree of consumer differentiation by the retailers. This is also confirmed by consumer studies, which show that all kinds of people use these stores; the wealthy just as much as the poor, the highly educated just as much as those with less education, urban peoples just as frequently as those living in rural areas (Lavik et al., 2003).

While Norwegian grocery retailers are horizontally integrated, with four groups covering 99% of the market, their grip on the vertical value chain is less secure. For instance, only 53% of deliveries to the shops are run through the retailers own wholesalers; the rest are delivered directly to the shops by the manufacturers notably by the joint fresh produce distribution company of the agricultural cooperatives, Landbrukets ferskvaredistribusjon. Despite a focused, coordinated and highly politicised effort to increase the market share of the wholesalers, the retailers have only managed to raise it some 8 percentage points since 1995. More than anything else this demonstrates the limitations of retail power in the Norwegian food market.

Another indicator of their limitations can be seen in the relatively low market share for retailer private label goods. According to AC Nielsen (2003) about 8% of the goods sold are retailers' own brands. This level is just below that for the other Nordic countries, and puts the Nordic region near the bottom of private label shares in a European context. Moreover, it should be noted that food products are mostly absent from the list of Norwegian private label products. The retailers have focused on selling manufacturers' brands, effectively at low cost. In the meat sector, this has meant a dominant strategy of selling pre-packed manufacturers' branded goods. As a result, Norwegian retailers have relatively weak competence on food safety and quality (Jacobsen and Kjærnes 2003). In these fields they lean heavily on their suppliers as well as a highly trusted public food safety system (Peppe and Kjærnes, 2004). Their strengths are foremost in the area of procurement and logistics.

The retailers' limited powers are partly an intended effect of Norwegian agricultural policy. Norwegian agriculture is protected behind high import tariffs, the highest in the industrialised world (OECD, 2004). Tariffs on some products are as high as 200–300

percentage points (<<http://tass.interpost.no/toll/>>), and hence foreign goods are simply too expensive to be sold in the Norwegian market. The tariffs deter retailers from importing the main fresh meat, poultry and milk products. Sourcing for fresh agricultural produce is restricted to Norwegian farmers and domestic producers. One consequence of this is that Norwegian agricultural products are among the most expensive in the western world (OECD, 2004; Lavik et al., 2003). Another consequence is that Norwegian retailers are stuck with domestic suppliers. Farmers' cooperatives in milk, meat and poultry/eggs thus effectively control their markets. They are secluded from central aspects of Norwegian competition law, e.g. regulations on price cooperation, in part because they have a delegated role as market regulators (Almås, 2004). Thus, farmer cooperatives' branded goods hold monopolistic market shares in the milk, meat and poultry markets:

- the dairy cooperative TINE holds 93% of the fresh milk market;
- the meat cooperative Gilde hold more than 70% of the wholesale market and around 60% of the consumer meat product market; and
- the poultry and egg cooperative Prior, holds some 70% of the market for both poultry and eggs (Norsk landbrukssamvirke, 2004).

Because only domestic suppliers have the capacity to serve the retail distribution systems, the farmer cooperatives' brands, TINE, Gilde and Prior are among the best-known and trusted brands in Norway (Aftenposten, 2004). They are virtually unchallenged in the market, in part because relatively weak price competition enables the cooperatives to spend almost as much money on marketing as they want. There are as a consequence no independent manufacturers to produce private retailer branded food products (retailers' meagre market share for private label food products can be interpreted in this light).

We need to set animal welfare in this broad retail context. For instance, the powerful farmers' cooperatives are relatively passive when it comes to welfare issues. This is because they are owned and controlled by their suppliers, the Norwegian farmers. In representing their farmer-members, they pursue a high degree of egalitarianism. In particular, they do not discriminate between different qualities of the products delivered (Gripsrud et al., 2001). The outcome has been described as a 'bulk regime', wherein Norwegian consumers have been presented with a narrow range of generic products, with almost no attempt at differentiation and market segmentation (Jacobsen and Stræte, 2002). In short, for the retailers as well as for the dominant farmers' cooperatives, animal welfare is a non-competitive issue. In fact, their strategy might be described as 'reactive' rather than 'proactive': farmers' cooperatives do not want to highlight the issue, and the retailers do not have the necessary competence or power to do so. Animal welfare seems to be regarded as a 'public good' by farmers, the food industry as well as by consumers, one that should be taken care of in the political sphere by public authorities rather than in the market sphere by private companies (Berg, 2002).

SWEDEN

The situation in Sweden bears some striking similarities to Norway but there are key differences too. The first similarity is the degree of concentration in the retail sector. During the last thirty years or so, Swedish food retailing has been dominated by three major organisations: ICA, Coop and Axfood. These organisations control around 95% of food retailing in Sweden. ICA, with a market share of 48% is what might be called a retailer-run federation, with most of the 1900 ICA-stores owned and operated by individual storeowners. The owners hold up to 91% of the shares in their store(s) and the central ICA organisation retains a 9% control holding (the individual store-owner is not allowed to sell the store without offering it to the central organisation first). As a consequence of this individualised ownership and management arrangement, the individual stores can decide on assortments, marketing strategies, product profiles, etc. However, in practice the central organisation of ICA makes more and more of the decisions for the individual storeowners. 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. Since the year 2000 the Dutch firm Ahold has become a co-owner of ICA and this has heightened centralising tendencies (Ahold currently owns 60 % of ICA).

Coop, with a market share of 23%, is a consumer cooperative. This is also a sort of federal organisation, where individual consumer associations with a regional or local base operate the stores. This has meant that differing stores have very different product assortments and marketing profiles. Again however, as in the case of ICA, things are becoming more and more centralised, with increasing numbers of strategic decisions now being taken at the organisation's headquarters. Coop Sweden is also involved in the consolidation of Coop Nordic, a joint Nordic organisation made up of the consumer federatives of Sweden, Norway and Denmark (see discussion of Norway in Chapter 11).

Axfood, with a market share of 23%, is the third organisation and here we find the most diverse food retail group. It contains both centrally run chains (e.g. Willy's, Hemköp) and retail federations (e.g. Vivo, Handlarn, Spar). Axfood is part of Axel Johnson AB, one of Sweden's largest family run business groups, and is listed on the Stockholm Stock Exchange (which is not the case with ICA and Coop). Alongside these three major organisations we find two others, Bergendahls and Reitan. Bergendahls, with a market share of 4%, is a traditional food retailer and is family owned. It has a strong market position in the south of Sweden (but is now also active in the Stockholm area). Bergendahls mainly operates hypermarkets, many with a discount emphasis. Reitan, with a market share of 2 %, is a Norwegian food retailer that mainly runs Pressbyrån

and 7-Eleven stores in Sweden. Both of these are small assortment, convenience type of stores.

The overall food-retailing sector in Sweden is therefore highly concentrated, allowing retailers to gain dominance over their suppliers. This power advantage, especially for the largest group, ICA, has increased since Sweden joined the EU in 1995. Prior to that date, the retailers only had one supplier to choose from in several key sectors, notably dairy, meat and corn (Elg and Johansson, 2000). Since 1995, deregulation and access to the Single European Market has allowed Swedish retailers to choose from many more alternative supply sources. Swedish food suppliers have, therefore, come under increased pressure, with many small and medium-sized companies going out of business, while others have entered into collaborative relationships. Nevertheless, the farmers' federation still holds a large market share in dairy products, meat (whole or processed) and flour.

While food retailing in Sweden at the present time is not as integrated – vertically, horizontally or internally – as is the case in other European countries (e.g. the UK), development efforts are currently focused on increasing integration. The central offices of the leading food retailers are making more and more of the strategic decisions concerning assortment, product placement, prices etc in the various stores incorporated in the chains. In this context, most Swedish grocery retailers have reorganised to follow a format-oriented organisational structure, combined with category management techniques. One result of this move towards a format-oriented retail organisation is greater pressure to provide a coherent assortment in all the stores belonging to the same format group. Thus, it should now be possible for a supplier to negotiate directly with a single format office, which will then guarantee that the supplier's products will be found in all the stores of a particular format. In essence, the format should operate like a vertically and horizontally integrated chain. However, in the Swedish case, the format office simply provides a blueprint and the supplier is still responsible for selling the product into the store level, as in most cases the store merchant is the store owner and (s)he retains the wherewithall to counter centrally made decisions.

Despite pressures for concentration, in many organisations central initiatives have been limited in their ability to change things at the store level. Changes in product presentation, marketing and assortment have happened mainly as a result of initiatives in the individual stores. Thus, in Kumar et al.'s (2000) terms, Swedish food retailing can be characterised as 'market driven' rather than 'market driving', as 'reactive' rather than 'proactive'. Retailers continue to see themselves as sellers of supplier's branded products and hold a relatively passive role in terms of the goods made available to consumers. This passive role vis-à-vis suppliers has meant the retailers only control shelf space, i.e. what products get in the store. However, in stocking their shelves the retailers aim for a compromise between what consumers want and what the suppliers are prepared to offer. Thus, the retailers work mainly as distributors of brands (manufacturer's brands) rather than as marketers of their own brands, although this situation is now changing (Johansson et al., 2003).

Prior to entry into the EU the food sector was relatively closed (along the lines of the Norwegian model). Thus, Sweden has traditionally been 'plagued' by high food prices.

While integration into Europe has meant retailers now have access to a wider range of products there is still a legacy of the earlier period (the majority of the products sold in the stores are still Swedish, especially in meat markets). However, 'internationalisation' has also meant the incursion of 'hard discount operations (not least by Lidl, which entered the market in 2002, and the Netto concept, which is operated inside ICA). Price has now become a key aspect of inter-firm competition. As has branding and private brands are now growing rapidly. The strategic role of private brands for grocery retailers has been pointed out by Burt (2000): he shows they have increased from 5% two years ago to 15% in 2004, with further increases likely as the retailers come to identify this as an important means of moving from distribution to marketing (Johansson, 2002, 2003). Assortments in Swedish food stores are comparatively small and with the increased presence of private brands they will probably become even smaller. This also means that it will become even more difficult for suppliers to get their product into the retailers' assortments, especially if it is not a private brand or not a well-known manufacturer brand.

Like Norway, Sweden is a society characterised by high levels of trust in the institutions of government, i.e. the central and local government as well as different government bodies that govern what companies do. This level of trust means that Swedish consumers expect things that are sold in Swedish supermarkets to be 'safe' and 'not to be harmful'. The same assumptions surround animal welfare so that consumers assume the state has underpinned the agricultural sector with appropriate or high welfare standards. Nevertheless, animal welfare is entering into the commercial strategies of the retailers. All the Swedish retailers are selling eggs from free-range hens and the market leader, ICA, is concentrating upon communicating a clear position to consumers on animal welfare issues using its own brand products. It is not obvious at the moment though, if it is the country of origin information (e.g. Swedish meat) that is most effective at communicating animal welfare characteristics or association with more ecological processes of production (e.g. organic).

THE NETHERLANDS

Within the Netherlands, about 75% of total food sales are accounted for by the supermarkets. The largest players in the market are Ahold, Laurus, Aldi and C1000. The level of concentration is fairly high as indicated by Table 1.

TABLE 14.1 Market shares Buying Cooperatives in The Netherlands, 2001.

Organisation	Market share (%)
Ahold	27.4
Laurus	22.0
Superunie*	21.3
Schuitema (TSN)	15.0
Other	14.3

Note: *Superunie is a cooperative with 16 members.

Source: Bijman et al., 2003.

In general terms, the Dutch retail sector comprises the following:

- Albert Heijn, which is the largest player in the Netherlands. It is located across the entire country and consists of about 700 regular supermarkets, 33 AH-to-go shops (found for instance in train stations), 4 hypermarkets (Albert Heijn XL) and an on-line delivery service (Albert). The holding company, Ahold, is a multinational enterprise, with the formats Stop & Shop and Giant-Landover in the US.
- Laurus is number two in terms of combined market shares of outlets. Laurus currently has 291 Edah stores, 45 Konmar SuperStores and 391 Super de Boer stores. Laurus has recently gone through rough times. In 2001 it decided to change the formats of Edah and Super de Boer over to the Konmar format (high margin, high service). This resulted in near bankruptcy, which was only staved off by a takeover by Casino (from France), which now owns 38% of the company's shares. Currently Laurus is changing the formats back to Super de Boer and Edah, the former with a service strategy, the latter with a strategy of Every Day Low Pricing. Konmar will also move towards a low price strategy, though with an extensive assortment.
- Schuitema currently has 472 C1000 stores spread throughout the country. Despite the price-war, the (financial) results of Schuitema were positive in 2003. Their nonsense approach as a value-for-money supermarket seems to appeal to consumers. Ahold has a 73.2% share in Schuitema, but the companies act separately in the market.

- Discount supermarkets or ‘price fighters’ like Lidl and Aldi. These companies have made a successful entrance in The Netherlands – Aldi now has 390 outlets and Lidl 200 outlets. Currently Aldi and Lidl have a combined market share of over 10%.
- Sperwer Holding has three formulas: PLUS, Spar and Garantmarkt. Spar and Garantmarkt are generally small stores (on average 280 respectively 296 m²), PLUS is on average 740 m². PLUS focuses on the high quality and service segment, SPAR and Garantmarkt are more local, with a broad but shallow product assortment.

The high level of concentration in the Dutch retail sector has implications for the relationships between suppliers and retailers. In order to reach consumers with their products, suppliers and manufacturers often have to pay slotting allowances for shelf space to the retailers. Other commonly found terms are: listing fees, end-aisle fees, fixed end-of-year rebates, return of unsold units, contributions to special promotions, and long-term payment demands (Dobson, 2003). Yet, increasing concentration can also have positive effects on the relationship between retailers and suppliers. One example of a long-term relationship is the agreement between Laurus and The Greenery, an organic producer of fruit and vegetables. The Greenery now provides the organic fruit and vegetable assortment for Super de Boer and Konmar (Laurus, 2003). Likewise, in 1999 Ahold guaranteed it would ensure a certain level of price and sales for producers of organic pork meat (over a three-year period). The Sperwer Group (Plus, Spar, Garantmarkt) signed the same agreement. Unfortunately, sales did not increase in line with the optimistic estimates made during the early phase of the project, resulting in overproduction. Ahold then proposed to finance the conversion of the scheme’s producers back to conventional farming methods.

The relations between supermarkets and suppliers are usually defined by the overall strategy of the supermarket in distinction to its rivals. Broadly, in The Netherlands three types of supermarket types can be defined: service, value-for-money and first-price (see Table 14.2). Formulas like Albert Heijn (Ahold) and Konmar show a brand identity of high service and high quality, while first-price stores focus mainly on low prices with low service. Some of the middle segment supermarkets struggle with their identity and are moving towards either service or first-price, for instance, Edah.

TABLE 14.2 Supermarket formulas in the Netherlands classified by type.

Type	Formulas
Service	Albert Heijn, Konmar, Super de Boer, PLUS, Coop, Spar
Value-for-money	C1000, Edah, Jumbo, Boni, Deen, Dekamarkt, Vomar, Jan Linders, Golff, Komart, MCD, E-Markt, Poiesz, Garantmarkt
First-price	Aldi, Lidl, Dirk van den Broek, Bas van der Heijden, Digros, Jan Bruijns, Hoogvliet, Nettorama

Source: EFMI and CBL, 2003.

The main dimensions retailers use to differentiate themselves from one another are therefore service image (levels of service) and price image (relative price level). Figure

1 gives an overview of the Dutch market, based on these two dimensions. The level of service is a general perception based on service, assortment, fresh produce, quality, etc. The figure is based on consumer perceptions rather than objective price measurements. It can be seen that some retail formats, those that actually have a value-for-money strategy, score relatively highly on service (e.g. Jan Linders, Jumbo, Poiesz), while some service-formats are perceived as expensive without much added value (Konmar, Super de Boer, Spar).

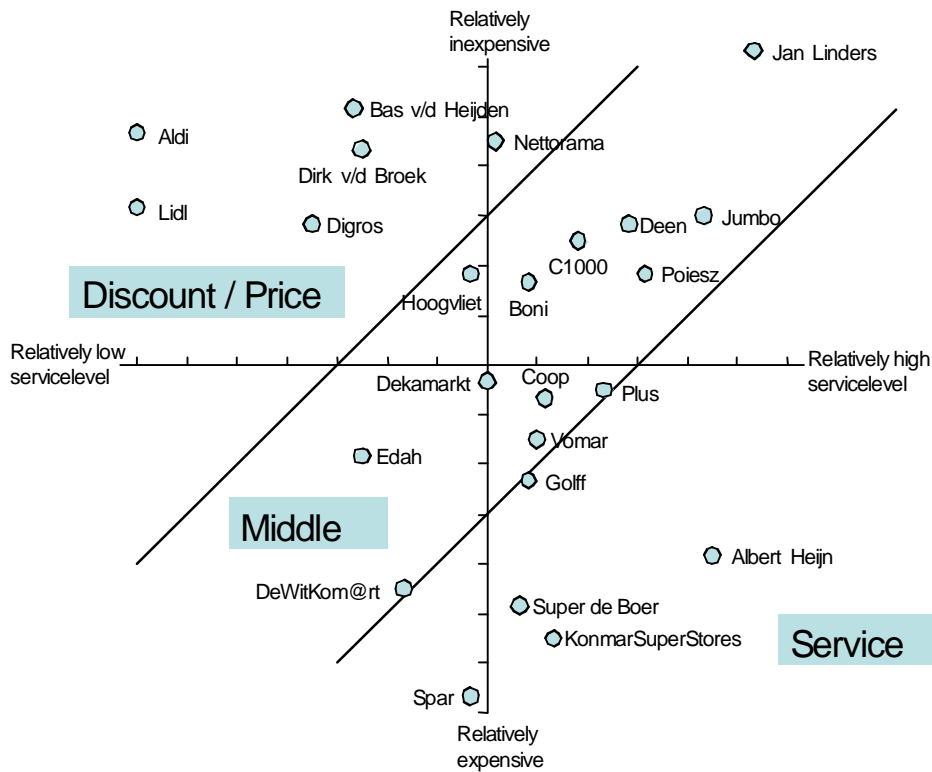


FIGURE 13.1 Dutch traditional retail market on price and service.

Source: GfK, 2004.

As shown in Figure 13.1, the Dutch market is going through some major changes that are useful to describe in the light of animal welfare. Albert Heijn had invested in service and quality since the 1980s, and Laurus tried to attack that superior position by transforming its formats in just a couple of weeks. The failure of this operation has thrown Laurus back and has thrown the market towards price competition. This increased the gap between Albert Heijn (and perhaps Plus and Super de Boer) and other formats. Since Albert Heijn is relatively on its own in the low right quadrant, it is pulled towards price competition, rather than it pulls its competitors towards competition based on customer value. This trend of moving to the upper left quadrant might have great consequences for the implementation and use of an animal welfare index, since focus on welfare or high quality products does not seem to be the driving factor in current retailing.

As in other countries, Dutch supermarkets are using private brands and own-label products to further differentiate themselves from one another, to such an extent that the Dutch government has recently expressed its concerns over the 'proliferation' of labels (Meeusen and Deneux, 2002; SER, 2004; Visser and Bos, 1998). Most labels deal with organic or social requirements. Labels solely based on animal welfare components are not common, and mainly occur on eggs and on some meat products. The use of safety labels is more widespread. Two different types of safety labels/certifications can be distinguished: consumer-oriented labels (CPE) and business-to-business labels (HACCP, Eurep-Gap). Both types of labels set safety standards for the chain, but the first group is communicated to consumers, while the second one is used only between chain actors and might not be (clearly) visible on packages. Retailers, in general, seem somewhat reluctant to use labels that imply better quality or sustainable production. The retailers try to make sure that consumers trust the products they buy in their store, including unbranded or private brand products. If a private brand does not have a certain quality label, and other products do, it might be thought to confuse consumers and decrease their trust in the private brand and perhaps even in the store.

UNITED KINGDOM

Food sales in the UK are dominated by four retailers (Sainsburys, Tescos, Asda and Morrisons). These supermarkets between them control over two-thirds of the grocery market. Effectively, the retailers (through their buying desks) act as narrow channels, linking UK agriculture to UK consumers. As Young (2004, p. 64) puts it, ‘around 233,000 UK farmers trade with the majority of the population via only a handful of supermarket companies, where UK consumers purchase 75–80% of their groceries’. As William Young (2004) reports, in one year alone (1978–9), the new supermarkets closed over 350 shops smaller than 5000 square feet and opened 60 of more than 10,000. Over the period 1971–9 the total number of grocery shops fell from 105,283 to 68,567, a decline of 35%. Continuing trends of this nature meant that independent shops saw their market share slip from 50% in the 1960s to under 15% by the late 1990s. The big winners from this process were Tesco (which became Britain’s largest retailer in 1994 and looks set to remain in that position), Sainsbury’s, Asda and Safeway (although Safeway has now been taken over by Morrison’s).

TABLE 15.1 Leading players in the UK, 2000–2001.

Name	No. of outlets	Sales (£m)	Profits (£m)	Advertising (£m)
Tesco	691	18,732	1,054	13.9
Sainsbury’s	453	12,931	434	25.6
Asda	240	10,019	405	19.5
Safeway	470	8,151	314.5	1.7
Somerfield	1,904	7,727	-2.6	3.5
Morrison’s	110	3,500	219.1	6
The Coop	1,623	3,055	45.6	6.1
Waitrose	136	1,982	25.7	3.9

Source: Young, 2004.

Clearly competition between these chains is fierce. One key aspect of such competition is price. MINTEL (2002) discusses the prominence of price as the main competitive issue amongst supermarkets.

‘Supermarkets focus on price, in basic food categories, as a draw to increase retail market share. Advertising for any of the big four has, for a number of years, focused on offering consumers the lowest prices. In this way, the multiples have highlighted the cost of food as a paramount consideration, when consumers may

have chosen to focus on different aspects. In basic food sectors such as poultry, this has led to a scenario where market values have been depressed due to the high level of product sold on promotion, particularly in the primary market' (MINTEL, 2002).

Some commentators believe that the level of (price) competition between the big four supermarkets ensures that prices to farmers are constantly squeezed (Blythman, 2004; Young, 2004).

TABLE 15.2 Average difference between farm-gate and retail price in the UK.

Product	Measure value	Farm gate value	Retailer receives	%Farmer receives
Beef	£/kg	1.72	6.58	26
Lamb	£/kg	2.24	4.57	49
Pork	£/kg	0.95	4.78	20
Chicken	£/kg	0.49	2.32	21
Bacon	£/kg	0.96	6.97	14
Milk	£/pint	0.09	0.36	25
Eggs	£/dozen	0.32	1.51	21

Source: Young, 2004.

Moreover, the fragmented nature of the UK farming industry ensures that farmers are in a weak bargaining position. During the Competition Commission's (2000) enquiry into supermarket buying practices, it emerged that there was a 'climate of fear' surrounding supermarket-farmer relations. The Commission's report listed a number of buying practices that seemed to work against farmers including:

- requiring suppliers to make payments or concessions to gain access to supermarket shelf space;
- imposing conditions relating to suppliers trade with other retailers;
- applying differing standards to different suppliers offers;
- imposing an unfair balance of risk, and imposing retrospective changes to contractual terms;
- restricting suppliers' access to the market, and imposing charges and transferring costs to suppliers;
- requiring suppliers of groceries to use third-party suppliers, such as packaging companies, nominated by the supermarket.

These practices put enormous pressure on suppliers to reduce price. As a result, farmers are often paid less the costs of production. For instance, a National Farmers' Union (NFU) survey in 2002 found that for a basket of food goods that cost £37 in the supermarket, the farmers would get only £11.26. As Young (2004, p. 58) summarises it, 'there is a suspicion among UK farmers that supermarkets are earning too much of their margin from suppliers (through charging for shelf space, charges for listing new products etc) rather than earning it off consumers'.

But price is not the only arena in which supermarkets compete. Johnsson and Burt identify branding strategies as especially significant, especially private brand development:

‘As most grocery retailers do now own manufacturing assets, their increasing involvement in private brand manufacturing goes beyond just buying an existing product on the market. To achieve product differentiation, close relationships need to be established and co-ordinated routines must be set up between the manufacturer and retailer’ (2002, 3).

Private brands account for 40–50% of the assortment of the leading grocery chains, and encompass a wide range of quality and customer oriented options (Johansson and Burt, 2004). Private branding strategies evolve from the simple ‘repackaged’ labelling option into a true product brand characterised by product development and added value ranges (Burt, 2000). Many of these ‘added value’ products are being developed by each retailer’s private brand such as Tesco’s Finest* and Sainsbury’s Taste the Difference. In the UK private brands form a significant part of market share for the leading retailers (see Table 15.3).

TABLE 15.3 Some key features of UK supermarkets.

Organisation (Type)*	Food Sales** (bill Euro)	Market share (%)	Number of food outlets	private brand (%)	Private brand (Number)
Tesco	28,691	20.6	770	50	12,000
Sainsbury (I)	23,047	16.5	453	60	10,200
Safeway (I)	13,627	9.8	255	40	7,000
Asda (I)	12,789	9.2	594	40	7,000
Somerfield (I)	7,157	5.1	1,408	47	4,600
<i>Total Market</i>	<i>139,372</i>	<i>100</i>		<i>39</i>	
<i>- top 3</i>		<i>46.9</i>			
<i>- top 5</i>		<i>61.2</i>			

Notes: * Type: I= integrated, C = consumer cooperative, BG = buying group; ** food sales = foodstuffs, housekeeping, healthcare, toiletries, drugstore products.

Private brand ranges require retailers to utilise their information and market power in a true channel leadership role, not merely to provide ‘improved’ trading terms (ibid). This necessitates a pro-active approach to maximise the complimentary skills of manufacturers and retailers (Hughes, 1996), and a reconfiguration of roles, functions and tasks within the traditional channel. ‘Typically retailers become more involved in all stages of the product development process from need recognition and idea generation to product and market testing’ (Hughes, 1996, p. 5). According to Johansson and Burt (2002) UK grocery retailers are divided into a number of business units, and a category management approach is evident. These business units are discrete entities in their own right and are often broken down into categories, which are managed by teams, with sub-teams working on specific product groups like biscuits, crisps etc. The teams are made up of marketers, buyers, product developers and merchandisers. The

marketers are responsible for sales, pricing and consumer attitude research. Buyers are mainly responsible for profitability, availability and are generally from a food science background. They understand what is physically safe, how to ensure that nutritional values are attained, and what can be practically made in the factory. The merchandisers are responsible for maximising the return on space in the store.

Given this level of control over the supply chain it is clear the retailers are potentially powerful players in supporting the market for animal welfare friendly food products. By providing their customers with a range of products with differential welfare standards, the UK Government believes 'retailers and their customers can specifically support and reward farmers who invest in standards of animal health and welfare that exceeds the acceptable norm' (DEFRA, 2004, p. 28). Marks & Spencer's and Waitrose are two British retailers that are placing themselves at the forefront of meeting the demand for animal welfare quality food products. Marks & Spencer's has received awards from the leading farm animal welfare group Compassion in World Farming (CIWF). In 1997 it became the first major UK retailer to exclusively sell free-range eggs. Then in September 2002 it became the first UK retailer to only use free-range eggs in all its food products. This covers 250 million eggs a year, laid by 700,000 chickens.

Waitrose and Marks and Spencers are undoubtedly the leading retailers in welfare friendly food products. There are not such clear commercial market agendas for the sale of welfare friendly food products in the other UK supermarkets (Tesco, Sainsbury, Asda, Morrisons, Somerfield). As a result they are some way behind the market leaders. However, there is some interest in animal welfare. For example, the UK's biggest retailer Tesco is involved with sponsoring various research projects on animal welfare issues, including the Food and Animal Initiative (FAI) in Oxford. One project from the FAI has been to identify new ways of improving the taste of Tesco Finest's pork products. As a consequence 'much higher fibre content has been introduced to the pigs' diets. This is beneficial to the intestinal health of the animals and consequently their overall well-being' (<<http://www.tesco.com>>). Tesco also helped to pioneer 'Freedom Food' products produced within the RSPCA's assurance scheme of the same name.

FRANCE

There is no fixed legal definition for each of the various components of the French food retail sector. Nonetheless, we might distinguish between the following structures:

- Hypermarkets and large supermarkets (where ground areas are commonly over 2,500 m² and a significant proportion of income – over a third – comes from food products). There are an estimated 1,211 hypermarkets in France at the present time covering some 7 million m² (Ecogest 2002). The most numerous are the Leclerc (419 outlets) followed by Carrefour (213) and Auchan (121). Following a rapid expansion in the 1990s, the number of hypermarkets has now stabilised at what many regard is a saturation level. The supermarkets/hypermarkets might be differentiated into two groups, the independents (Leclerc, Intermarché, Système U) and the large corporate groups (Carrefour, Auchan, Casino, Monoprix).
- Food supermarkets (where food sales represent over two thirds of their income and whose sizes generally fall between 400 and a legally imposed 2,500 m² maximum). There are currently some 5,612 supermarkets in France (figures for 2001). Most are chains, including Intermarché (1,501 outlets), Champion (943) and Super U (538).
- Discount supermarkets (such as the German firms Lidl and Aldi and the French firm Ed, set up by Carrefour) are a relatively new phenomenon in France and they are the fastest growing retail sector at the present time. They offer lower prices but are generally smaller than the supermarkets, up to 600 m². Some 3,440 ‘hard’ discount supermarkets exist in France today (Lidl 951, Aldi 444 and Ed 439). Increasingly, major hypermarket concerns are setting up their own discount chains (Casino owning a majority holding in Franprix and the Leader-Price chain).
- High street department stores where food sales traditionally represent only a small part – under a third – of turnover. Though to some extent, images of bygone shopping patterns, the department stores in many cities have survived as significant food retail outlets and in recent years have undergone something of a renaissance, though largely through the addition of designer clothing sales. There are currently 411 such stores in France with Monoprix (at 238 outlets) being the numerically dominant.
- Local shops and traditional outlets: regrouping local stores and butchers shops, which still represent a major purchasing locale for many French consumers. By far the most numerous retail outlets in the food sector, the total number of grocery shops stood at 19,800 in 1998 while the number of butchers in the same year was just over 14,000 and the number of bakers/pâtisseries 22,400.

- Other outlets include street markets, restaurants, canteens, ‘fast-food’ outlets and so on. These are beyond the scope of the present inventory.

As in other European states, the food retail sector is dominated by two major trends. The first of these has been, over the last 30 or so years, a major restructuring of the food retail sector characterised by the emergence and dominance of supermarkets and hypermarkets as the principal retail outlets for food sales. Aided by high inflation rates in the 1980s, larger retail outlets were able to profit enormously from economies of scale and relatively easy access to greenfield development sites in urban peripheries. Over 60% of food is now purchased in supermarkets and hypermarkets. Part of this restructuring process has also included the inevitable decline of smaller and traditional food retailing outlets across France, which until recently had been given some protection by national government legislation (Lutinier, 2002). The total number of grocery shops has declined from 87,600 in 1966 to 19,800 in 1998, with the number of butchers shops falling from 50,500 to just over 14,000 and the number of bakers/patisseries from 40,200 to 22,400. The majority of French meat sales, for example, now take place in hypermarkets and larger supermarkets. Together, these represented some 71% of the total volume of fresh meat sold to consumers in 2002. The remainder takes place in medium and small supermarkets, butchers shops and local shops.

A final element to the current restructuring of the French food retail sector has been the dramatic growth of ‘hard discount’ firms over the last ten years. Accounting for around 8% of self-service food sales in France in 1998, this represents a significant growth on the 1% at the beginning of the 1990s. Although German firms such as Lidl and Aldi continue to dominate the hard discount sector, French companies (notably the company Système U and the outlets Ed and Leader Price) are gaining ground. Today the hard discount sector represents around 12.7% of all self-service food sales in France (and 15% of fresh produce) (Vacheret, 2004).

TABLE 16.1 Growth of ‘hard discount’ stores in France.

Store	Number	Percentage
Lidl	1116	+ 52
Aldi	602	+ 78
Ed	596	+ 97
Leader Price	370	+ 14
Netto	305	+ 27
Le Mutant	219	+ 5
Norma	118	+ 10
Penny	95	+ 4
Total	3421	+ 243

TABLE 16.2 Major food retailers in France.

Name	Sales within France, in billion €(excl. tax)	
	2002	2003 (estimate)
Carrefour	68.73	70.7
Intermarché *	38.40	39.0
Auchan	27.60	30.1
Leclerc *	26.00	27.3
Casino	22.86	14.0
Système U *	12.74	9.5
Cora (Delhaize)	9.30	3.8
Monoprix	3.72	3.3

Note: * Figures for these firms include tax.

Source: Entreprises/Lineaires, 2003.

The second major trend of the last 30 years has been the centralisation of the retail sector with a relatively small number of companies, predominantly those operating major supermarkets and hypermarkets, controlling a growing share of the market and increasingly the food chain itself, from food production, processing, retailing to marketing and sales. By the middle of the 1990s, the five leading companies shared 51% of total food sales (Dobson Consulting, 1999). Since that time, Carrefour and Leclerc in particular have seen further growth in sales profit (Carrefour marking a 2.6% growth in sales from 2002 to 2003 and a growth in profits of 11% over the same period, though part of this has come from international investment). Today, the top five commercial companies are estimated to control over three quarters of French food distribution (Transrural Initiatives, 2003).

Potentially the most significant of these trends has been the growth of the hard discount stores. Offering generally cheaper brands in functional retail outlets, these stores are clearly eroding the sales of the major supermarket/hypermarket companies who, over the last 15 years, have adopted a retail strategy founded upon improving the quality of the retail experience (with most new hypermarkets incorporating cafés, child-play areas and so on), upon the development of their own-brand products, and upon a wider range of customer services. The higher costs of such retail outlets have had to be recuperated through aggressive marketing, through passing hidden costs on to suppliers and producers, and through prices that while considerably lower than the traditional food sector. These retailers are now being undercut by the 'no-frills' discounters. If in 1991, the difference in product price between the French hypermarkets and the smaller food retailers was around 5% to the advantage of the hypermarkets, today it is nearer to being negligible. However, the price difference between the hypermarket's own brand products and the well known brands on the one hand and those cheaper brands sold in bulk in hard discount stores, on the other hand, is today at around 50% in the latter's favour. For INSEE, the cause of rising food prices in France is to be found in the pricing policies of the major retail chains who have chosen to sell either their own branded products or nationally and internationally known products in increasingly expensive to run retail outlets (INSEE, 2003).

In the competitive struggle between those retailers that offer high levels of service and differentiated products, the private label has become increasingly significant. France has a comparatively long history of using food labels to mark out the distinctive characteristics of products. The earliest labelling schemes (notably the AOC) were essentially driven by the desire to link the unique qualities of production location (the notion of 'terroir' as a combination of climatic, soil and agronomic factors) to food taste and quality. Hence the earliest labels applied to wines and cheeses. Recent years however, have seen a veritable explosion of local product labelling schemes. The territorial (and to a certain degree rural social and economic) embeddedness of the terroir as a referential of food quality (primarily in taste and gustative terms) has given way to new concerns emerging from: (i) consumers (in need of reassurance following the food crises of the 1990s), (ii) environmentalists and landscape affectionados (convinced of the inherent sustainability of localised production systems), (iii) retailers (eager to gain advantage in an increasingly competitive market), (iv) producers (keen to maintain a greater proportion of value-added on the farm in a response to the economic downturn of French farming), and (v) government (eager to see endogenous quality food networks replace exogenous state funding as the motor of rural development). The new referentials of food quality labels are therefore food chain traceability, production standards, animal health, respect of the environment, multi-functionality and so on. However, traditional concerns for the taste and authenticity of agricultural produce still remain a key component of French labelling, as the relative success of the Label Rouge demonstrates.

The latest and possibly the fastest growing labels are those established and promoted by the larger retailers. Examples include 'MonoprixGourmet', Carrefour's 'Reflets de France', Leclerc's 'Nos régions ont du talent', Cora's 'Patrimoine Gourmand' and others. Once associated with cut-price alternatives to well-known brands (as many of the latter's advertisement campaigns remind consumers), private retailer brands are increasingly presenting themselves as the better quality product by drawing consumer attention not to the name and hence reputation of the food company concerned but to the specific processes, contents and origins of the product sold by the retailer. Paradoxically, given the implicit and often explicit emphasis on quality, the growth of retailer brands depends largely upon the price differential that large retailers can create between lower cost inputs (direct from producers, wholesalers or manufacturers not operating with a major brand) and the higher sale costs generated by labelled products (as against non-branded products).

Retailer labels have thereby been an important element in the concentration of retailer power within the commercial food sector. Have they now gone too far? This is the question debated by the Conseil national de l'alimentation in its report of 2003. Recent figures suggest that consumer confusion, not to say mistrust, is already having an effect on the sales of labelled products. In 2003, the sales of labelled assurance scheme products (including Label Rouge) fell by 2% while those of AOC products (excluding poultry) fell by 6% (Linéaires 2004). Most of the major French players operate their own brand schemes though in market share terms, such schemes are more important for smaller supermarkets than the major hypermarket retailers. However, the number of retailer-own products increased dramatically across the board: retailer labels operated by Auchan rose to over 10,000 and Carrefour 8,000 (Transrural Initiatives, 2003).

TABLE 16.3 Proportion of sales accounted for by own brand food products by retailer, 1996.

Company	% of market share accounted for own brand	Number of items branded
Franprix	28.0	no data
Casino	24.8	1800
Intermarché	24.7	2500
Géant	20.0	1800
Carrefour	18.9	1642
Monoprix	18.7	1800
Système U	18.5	985
Continent	17.8	1440
Stoc	16.2	650
Auchan	15.7	1500
Match	15.4	1100
Champion	15.1	1240
Leclerc	14.8	500
Cora	12.2	1224
Prisunic	11.7	550

Source: Dobson Consultancy, 1999.

Few, if any, of the retailer (and other) label schemes specifically refer to animal welfare considerations. Where animal welfare conditions are specified (usually in conformity and assurance schemes), they most commonly refer to animal health, access to water and space and transport conditions – though all three are increasingly covered by mandatory national and EU legislation. The most common product types for which reference is specifically made to welfare issues appear to be veal calves, chicken and eggs. Behind the labels themselves, lie a series of negotiated strategies between retailers and producers through which issues of animal welfare are either included or not into the specified conditions of production that guarantee contracted producers access to supermarket shelves and provide retailers with additional product value. The most common strategy is the establishment of contractual relations between producer groups and retail chains whereby the former supply meat products following strict production conditions (see below, box examples). This guarantees them access to an increasingly competitive market and allows the retailer to sell quality products at higher value. While this can be seen as an extension of retailer power down the commodity chain, it is also a partnership, with many such initiatives commencing at the producer ‘end’. In one sense, this builds upon three pre-existing traditions in France; that of locally specific production centres; that of producer cooperative ventures, and that of producer-based labelling.

ITALY

Despite significant growth over the last decade, Italian distribution still appears highly fragmented compared to other European countries. In part, this fragmented structure reflects the localised nature of food consumption in Italy. All regions, and many localities have quite specific cuisines and therefore have rather specific demands when it comes to food products. This has militated against the development of a national market by national (or international) retailers (as in the case of the UK). However, perhaps just as significant in maintaining a fragmented structure is national legislation (notably Italian Law 426/71 'Regulations for Commerce'). In the main, this legislation has functioned to protect small businesses from competition and has imposed limitations on the spread of new forms of distribution, thereby preventing the more dynamic foreign companies from moving in. However, since 1998 (and the so-called 'Bersani Reform') there has been some rationalisation and unification of this national legislation. Following the reform, more modern distribution systems have begun to develop. Thus, during the last ten years the market share of traditional shops has fallen from 40% to 22%, while the share taken by supermarkets has grown from 34% to 42%. In the same period, hypermarkets have increased their market shares from 4% to 15%. Between 1997 and 2001, large-scale distribution systems grew by an average of 11.6% each year, while there was an annual reduction of 6.4% in small-scale distributors. In 2003 the traditional retail grocery market covered 16.5% volume of sales of the Italian market while large-scale distributors held the remaining share, 83.5%. Indeed, the latter recorded an annual increase of 6.5% and 6.7% in sales in 2002 and 2003, respectively. In particular, the share of the largest five retailing groups now stands at almost 80% of the total market, with Coop Italia taking 23.1%, followed by Auchan-Rinascente with 17.9%, Carrefour with 17.6%, Finiper with 12.6% and Bennet with 6.8%.

TABLE 17.1 Growth rate of large scale retail trade in Italy (annual percentage turnover).

Year	Annual percentage turnover
2000	+ 8.5
2001	+ 7.0
2002	+ 6.5
2003	+ 6.7

TABLE 17.2 Market share dynamics of different forms of distribution in Italy (percentage turnover of groceries).

Form	2001	2002	2003
Traditional	22.0	20.0	16.5
Minimarket	16.0	15.5	14.5
Supermarket	37.0	37.5	39.4
Superstore	5.0	6.0	6.8
Hypermarket	15.0	15.5	16.3
Discount store	5.0	5.5	6.5
Total	100.0	100.0	100.0

Source: Cermes, 2004.

At the end of 2002 the distribution network consisted of about 192,000 shops, which was a decline of 5% compared to the previous year. The decline was focused on shops selling meat and meat-related items (-2.3%), those selling fruit and vegetables (-2%) and those selling other specialised products (-6.2%). However, these trends varied across the country. In the centre-north, the number of food shops declined by about 1.6% while in the south it increased by about 0.8%, concentrated especially in the non-specialised category (+4%). Figures from INEA show 6,804 supermarkets in Italy on 1st January 2002, against 6,413 of the previous year, (+6.1%). The increase was greatest in the south of Italy (+8.7%). In short, in 2002 there was a total of 7,163 shops, a 5.9% increase on 2001. The increase was highest in the south of Italy and in Sardinia and Sicily, (9%). The overall surface area of sales grew to more than 7,8 million m² (4.7%) with a total of more than 184,743 employees (4.2%). Discount stores numbered more than 2,913, for a total surface area of about 1,3 million m².

TABLE 17.3 Share of turnover of strategic groups.

Strategic Groups	Italy	North West	North East	Central Italy and Sardinia	South
Cooperatives	27.0	15.6	36.5	37.3	23.8
Multinationals	28.8	36.0	21.3	26.4	27.6
Independent chains	15.2	27.3	8.9	14.8	0.3
Associated distribution	27.6	19.5	33.0	19.2	46.8
Other	1.4	1.6	0.4	2.3	1.5
Total	100.0	100.0	100.0	100.0	100.0

Source: <<http://www.sisaspa.com/panorama/0702/3c.htm>>.

In summary, in just a short time Italy has seen big changes in distribution with a series of agreements and alliances among overseas and domestic distribution groups operating in the country. Because of the gradual concentration of the retail structure, there has been an increase in bargaining power of the large-scale operators. In other words, whereas in the past a branded product reached supermarket shelves on conditions laid down by the producer, as far as pricing policy, merchandising, promotions, advertising

and quantities are concerned the position is now weighted in favour of the distributor. The increase in bargaining power of the five central sales units of the big retailers, which group together about 20 distribution chains, covers 83% of the market as shown in Table 17.4.

TABLE 17.4 The positions of central sales units in Italian supermarkets.

Supermarket	Share
Coop Italia + Sigma	19.6
Intermedia	17.4
Esd	16.4
Carrefour	15.6
Mecades	14.0
Conad	9.2
Rewe	2.3
C3	1.8
Others	3.7
Total	100.0

Source: Cermes, 2004.

At the same time, there has also been a growth in the development of private labels, which now account for just over 11% of products sold. Almost all the supermarkets use such labels. Certain supermarkets use private label regimes as ways of ethically distinguishing themselves from their rivals. For instance, Coop Italia, the largest supermarket chain, offers a range of socially- and environmentally-responsible product lines: 'Solidal', which respects children and worker rights; the 'Bio' line, which offers organic products, including meats, cheeses, breads and many specialities from selected farms; the 'Ecolabel' line, which reflects a commitment to reduced environmental impact and pays most attention to packaging, use of environmentally friendly materials and recycling; and the 'Prodotti con Amore' line, which aims to encourage environmentally friendly agricultural production methods, eco-compatible husbandry and slaughtering systems, and ensures that products are not tested on animals.

Likewise Coop brand eggs reflect this constant commitment. Coop brand eggs are produced following 4 important rules:

- Only Italian laying hens are used, all raised exclusively on the ground, in full compliance with animal welfare.
- The hens are not in cages, free to move about and, above all, free of any genetically modified organisms. They are only fed wholesome plant-based feed which is free of any animal fats and flours.
- The yolks have their natural color because synthetic dyes are totally absent from the feed.
- The production chain follows the animals from birth all the way to sale: an accredited outside agency supervises production, breeding methods and oversees the hygiene and health of our hens.

Likewise, Esselunga presents a wide range of products with its own brand, created to meet the needs of consumers who are particularly interested in quality, well-being and environmental protection. For instance, Esselunga Naturama guarantees traceability on selected meats through agreements with suppliers (e.g. feed producers, breeders, slaughterhouses, processing centers).

The 'Esselunga Bio' brand was founded in 1999 and is the largest organic product line of all large-scale distribution chains offering more than 450 products. Among the commitments Esselunga has taken on in this regard, mention must be made of the following:

- The decision not to use agricultural chemicals or genetically modified organisms; the use of natural means to protect crops from parasites and disease.
- Fertilization with organic substances and natural minerals.
- Cultivation suitable for the climate and place, crop rotation, respect for nature's times.
- Animal wellbeing in compliance with their biological needs: adequate spaces available for husbandry, possibility of grazing, non forced feeding with organic plant feed.

It would seem, then, that environmental and animal welfare issues are being increasingly regulated within private labelling schemes. However, it is important to note that the trends identified above vary quite markedly between sectors, especially within the food domain. So for instance, 30% of beef is sold through modern distribution channels, but 36% still goes through the traditional retailing sector. For pork, 24% is sold through modern distribution channels while 24% goes through traditional retailing outlets. And for poultry 38% is sold through modern distribution channels and 22% through traditional retailers. As we have seen, for most foods, the trend is away from traditional shops towards modern sales points. But the structure of distribution in the meat sector has always been based on traditional shops and localised consumption practices. Such habits are very deep-rooted and have made it difficult for supermarkets to engineer a move away from local outlets to butchering counters inside supermarkets or hypermarkets. As a result, the market share of modern distribution in the meat sector, particularly beef, is worth 10 percentage points less than for other fresh products such as dairy produce. Any move towards enhanced animal welfare in the meat sector will need to be made in a context of a still fragmented retail sector.

CONCLUSIONS TO PART II

These various country case studies reveal some important characteristics of retailing in Europe. First, and not surprisingly, concentration is increasing, with fewer and fewer retail companies now dominating national markets. However, the nature of concentration varies from country to country. The Netherlands and the UK perhaps show the process at its most complete with three or four retailers exercising domination over around 70% of the food market. These retailers also use their buying power to source products from a number of diverse locations so these national retail contexts are not only concentrated but internationalized also. In Norway we see a high level of retail concentration but here the major retailers are forced to source products from within the Norwegian agricultural system. Thus, Norwegian retailers are confronted by powerful farmer cooperatives and wholesalers. Retail concentration therefore fails to translate into retail power. In Sweden the nature of concentration is complicated by the federal structure of the main retail chains so that some considerable autonomy still lies at the individual store level. While the trend to greater centralisation seems now to be set, this is likely to unfold in an uneven fashion across the sector. As in Norway, the Swedish market remains relatively closed despite the country's recent entrance to the EU. Nevertheless, Sweden appears to be in the process of acquiring a more concentrated and open retail system. Where Sweden is headed Norway looks set to follow, though the time horizon remains uncertain.

In France and Italy we see many of the same centralisation and concentration trends. Both these countries retain a more traditional retail structure – which has been safeguarded to some extent by the state – and this structure still holds an important place in the overall retail context. However, large retail chains are beginning to take over the bulk of the market (though this varies between sectors), with the consequence that further rounds of centralisation and concentration look inevitable. Nevertheless, both France and Italy retain nationally specific retail structures that reflect, to some extent, the distinctive consumption demands of consumers in those countries. Thus, it is possible to discern some degree of market closure associated with a consumer culture that is rooted in regional and local culinary traditions. Whether these traditions can survive inside a more centralized retail structure remains to be seen.

Given this trend to more centralised and concentrated retail systems, it is no surprise to find that competition between the main players is intense. As we have seen, competition revolves around price and levels of service. In all countries a number of retailers seek to distinguish themselves by offering low prices, with price wars breaking out on occasion. This price competition has been exacerbated by the arrival of hard discount stores in

many national contexts. The hard discounters undercut the traditional supermarkets by offering products with the minimum level of service so that consumers are concerned with only one dimension of the retail experience – the cost of the goods they purchase. Nevertheless, the levels of service that retailers provide remain an important variable. A number of firms seek to provide high quality food items in the hope of enticing discerning consumers to part with greater amounts of money. In the execution of this strategy, food labels come to play a key role. We have seen in almost all countries (with Sweden and Norway perhaps the exceptions) that labelling is a means of communicating information beyond price. This approach can be used to project the supermarket's brand image or in order to communicate more specific product characteristics. For instance, a number of supermarkets use labels to draw attention to the ethical aspects of production and consumption (for instance, fair trade, organics and environment) with some focusing specifically on animal welfare (for instance, Waitrose and Marks and Spencer's in the UK). Whatever the use of the label, this type of communication strategy appears to be on the increase, to such an extent that consumers may now be very confused about the various claims being made on behalf of certain products.

It is in this very broad retail context that we need to set animal welfare considerations. Clearly the major retailers are key players in the formulation and implementation of any strategies that aim to raise welfare standards. And equally clearly, there is considerable variation across Europe in terms of the role currently being played by retailers in this regard. In Norway the retailers seem to be beholden to the farmers' organizations that wish to keep animal welfare off the competition agenda whereas in the UK animal welfare constitutes a dimension of competition between the major retailers with some projecting themselves as welfare friendly supermarkets. In other countries (such as The Netherlands) animal welfare may just be one aspect of an increasingly complex set of food labeling considerations. In countries where hard discount is becoming increasingly prominent, little welfare competition may be evident, especially when it is expected that the state will ensure certain minimum standards (as is the case in Sweden). We must also remember that in Italy (and to a lesser extent in France) a great deal of food is sold outside the main retail concentrations. This is especially noteworthy in the meat sector where independent outlets retain a considerable hold over retail sales. Thus, any move to a more welfare friendly retailing approach must also be tailored towards these more traditional and specialised outlets. This observation further complicates an already complex picture.

PART III

REVIEW OF SOCIO-POLITICAL AND MARKET DEVELOPMENTS OF ANIMAL WELFARE SCHEMES

edited by

Bettina B. Bock and **Freek van Leeuwen**

Wageningen University, the Netherlands

INTRODUCTION TO PART III

This review has been carried out in six European countries (France, Italy, United Kingdom, Sweden, Norway and the Netherlands) and is based on literature and interviews with key informants.

This part of the report synthesizes the six national reviews. The national reviews give an overview of the current national animal welfare legislation concerning pigs, poultry and cattle and of existing national animal welfare schemes and programmes for the product ranges of pork, poultry and cattle. They analyse how these schemes have been established and to what extent producers engage with welfare standards and assurance schemes. The studies also examine farmers' experiences with participation in animal welfare schemes. Finally they assess the current (national) social and political circumstances that affect the adoption of animal welfare schemes.

It is the aim of this synthesis to both summarise and elaborate on the national reviews.

ANIMAL WELFARE LEGISLATION

As inhabitants of the European Union, farmers in five of the six participating countries have to comply with European standards, alongside with national legislation (Norway is not an EU member). Therefore the European directives concerning animal welfare are highly relevant and will be discussed below, prior to the comparison of the six national animal welfare legislations. As a matter of fact: the newly designed (but not yet ratified) European Constitution also contains an article on animal welfare. Article III-121 proclaims that ‘the Union and its member-states will take into account the welfare of animals as sentient beings in their policies concerning agriculture, fisheries, transportation, the internal market, science, and spatial planning’.

20.1 EUROPEAN LEGISLATION

On 20 July 1998, the Council of the European Union agreed on the instalment of Directive 98/58/CE, which concerns the protection of production animals. This Directive contains very general regulations about the treatment of animals, control and enforcement. A few examples of this regulation:

- The freedom of movement of the animal may not be restricted in such a way that it causes any harm or injuries.
- The housing facilities for the animal must be such that harm or injury is prevented as much as possible.
- Animals must have access to sufficient amounts of healthy and appropriate food and water.

This general Directive has been elaborated in several more specific directives, concerning respectively the welfare of pigs (Directives 91/630/EEC, 2001/88/EC, 2001/93/EC, 2001/88/CE), laying hens (Directive 1999/74/CE) and veal calves (Directives 91/629/CE, 1997/2/CE). These will be discussed in some more detail in comparison to the national legislations below.

20.2 NATIONAL ANIMAL WELFARE LEGISLATION

Apart from the European legislation concerning animal welfare (e.g. Council Directive 98/58/CE) all six participating countries have (additional) national legislation on this subject.

- Norway is not a member of the European Union, and Norwegian farmers do not have to comply with European legislation. However: the Norwegian legislation is to a large extent in line with European standards. In Norway, the 'Animal Welfare Act' covers the subject, and it is being revised at the moment (up to now Norway did not have a general directive for production animals; the new act will probably contain one.) Under the provisions of this act there are detailed animal welfare regulations for separate livestock sectors (e.g. pigs, poultry). Much of the implementation of the Animal Welfare Act is carried out by the KSL scheme, in which most farmers participate.
- In Sweden the basic criteria for livestock production are recorded in the 'Animal Welfare Act' and the 'Animal Welfare Ordinance'. Both acts were established in 1988, and since then amended several times. Specific requirements for each sector and all stages of the production process have been incorporated in these acts. As in Norway, much of the implementation of this legislation is carried out by quality assurance schemes, such as Miljöhusensyn (MHS).
- France has based its animal welfare legislation mainly on the European legislation, and transcribed it into a national decree (30-03-2000), including the specific European laws for the pig, poultry and veal sector.
- In the Netherlands the protection of animals is governed by a so-called 'framework law', the 'Gezondheids- en welzijns wet voor dieren' (Animal Health and Well-being Act). This act contains some general rules regarding the protection and treatment of animals. Specific amendments within this act focus on the protection of pigs, laying hens and veal calves. An amendment for the protection of broilers is being discussed at the moment.
- The UK has a long tradition in protection of animals. The welfare of on-farm animals is protected by the Agriculture Act of 1968 and the Welfare of Farmed Animals Regulations of 2000 and 2001 for England, Wales, Scotland, and Northern Ireland, which was amended in 2003. The Agriculture Act of 1968 allows the design for the Codes of Recommendation for the Welfare of Livestock. These welfare codes are considered to be the main basis for on-farm animal welfare in the UK. They are approved by Parliament, and although it is not a statutory requirement for farmers to follow these codes, failing to do so may be used as evidence in prosecution.
- The Italian animal welfare legislation is generally based on the European standards, laid down in the above described directives. At national level the directive 98/58/EC is applied by the legislative Decree 26-03-2001, n. 146. In this decree a specific chapter on fur animals has been added. For the cattle, pig and laying hen sector specific national Decrees are operative (30-12-1992, n.533 & 1-9-1998, n.331; 30-12-1992, n.534 & 20-2-2004, n.53; 29-7-2003, n.267).

20.3 EUROPEAN AND NATIONAL REGULATIONS FOR THE PIG SECTOR

The EU Directive 2001/88/CE describes the minimum standards for pig production within the European Union. All farmers within the European Union must comply with these standards. This directive orders that, for instance, sows must be kept in groups during the period between four weeks after insemination and the week before the farrowing. It also orders that fattening pigs and sows must be provided with adequate 'playing material' and a reasonable amount of fibrous fodder. This European regulation forbids moreover the permanent tethering of sows.

However, until 2013 a conversion period is operative. This means that:

- Pig houses built before 1 January 2003 must comply with the regulations set out in Directive 1991/630/CE. This directive includes some basic welfare regulations, i.e. some minimum surface requirements, the prohibition to keep pigs in the dark, and the obligation to provide the animals with adequate care. There is no obligation to keep sows in groups and tethering is allowed. But in the new buildings, tether stalls for sows and gilts are prohibited. Only from 1 January 2013 onwards these pig farms have to comply with Directive 2001/88/CE.
- From 1 January 2006 tethering is no more allowed on all farms.
- Pig houses built after 1 January 2003 must comply directly with Directive 2001/88/CE.

Some member states have additional requirements. The minimum surface requirements for weaned and fattening pigs are higher than the European standards in countries like the Netherlands, Sweden and Norway. Some countries have shorter conversion periods for group housing of sows, and some countries have additional requirements concerning the 'playing material'. Table 20.1 presents the main minimum animal welfare requirements of the six participating countries and the European Union. The following conclusions can be drawn from Table 20.1:

- The welfare requirements for pig production are remarkably similar in the six countries.
- Only Sweden clearly stands out with regard to the surface requirements.
- Only Norway has forbidden castration without anaesthetics. Anaesthetised castration is still allowed in this country however, until 2009, if it is carried out by a veterinarian. In some other countries there is also a discussion about castration. In the UK the practice is legal, but in practice it is forbidden by the BFS scheme (to be explained below).

TABLE 20.1 The most important minimum animal welfare requirements for pig farming in the European Union (EU), Norway (N), Sweden (S), France (F), the United Kingdom (UK), the Netherlands (NL) and Italy (I).

	EU	N	S	F	NL	UK	I
<i>Minimum surface requirements in m² per animal</i>							
Weaned and fattening pigs							
< 10 kg	0.15	0.15	?	0.15	0.20	0.15	0.15
10–20 kg	0.20	0.20	0.25–0.32	0.20	0.20	0.20	0.20
20–30 kg	0.30	0.35	0.32–0.40	0.30	0.30	0.30	0.30
30–50 kg	0.40	0.50	0.40–0.55	0.40	0.50	0.40	0.40
50–85 kg	0.55	0.65	0.55–0.82	0.55	0.65	0.55	0.55
85–110 kg	0.65	0.80	0.82–1.02	0.65	0.80	0.65	0.65
> 110 kg	1.00	1.00	1.02–1.75	1.00	1.00	1.00	1.00
Non-suckling sows	2.25	2.25	2.25	?	2.25	2.25	2.25
<i>Group housing in all farms* required by when?</i>							
Non-suckling sows	2013	present	present	2013	2008	present	2013
<i>Straw (or likewise) required?</i>							
Fattening pigs	no	yes	yes	no	no	yes	no
<i>Is non-anaesthetised castration allowed?</i>							
Piglets	yes	no	yes	yes	yes	yes	yes
<i>Is tail-docking allowed?</i>							
Piglets	yes	no	no	yes	yes	yes	yes

Note: Group housing is compulsory later than the deadlines indicated but for the new buildings the farmers have to comply already with the group housing system rule.

20.4 EUROPEAN AND NATIONAL REGULATIONS FOR THE POULTRY SECTOR

The European regulation concerning the welfare of laying hens has been worded into Directive 1999/74/CE. It prescribes that the current type of laying batteries is forbidden from 2003 onwards. A new system with stricter rules for animal welfare – the ‘enhanced cage’ – is the new minimum standard. There is a conversion period though, which implies that:

- Poultry stables built before 1 January 2003 may continue the ‘battery’ system until 1 January 2012, from which date they must either quit production or converse to the ‘enhanced cage’ system or an alternative free-range system.

- Poultry stables built after 1 January 2003 may not operate the ‘battery’ system, but they must directly comply with the minimum standards for the ‘enhanced cage’ system or ‘alternative systems’ (free-range systems).

In several countries this ‘enhanced cage’ (or ‘enriched cage’) evoke discussion. Many action groups feel that this new system is hardly an improvement for animal welfare as compared to the ‘old’ battery system. On the other side, poultry farmers strongly object to the proposed abolition of the laying battery. In fact, the ‘enhanced cage’ was mainly developed as a compromise. Table 20.2 compares the minimum EU standards with the minimum standards of the six participating countries. The table informs on the different levels of poultry protection operated in these countries.

TABLE 20.2 The most important minimum animal welfare requirements for poultry and egg farming in the European Union (EU), Norway (N), Sweden (S), France (F), the Netherlands (NL), the United Kingdom (UK) and Italy (I).

	EU	N	S	F	NL	UK	I
Minimum surface requirements in cm ² per animal (enhanced cage)	750	850	750	750	750	750	750
Minimum surface requirements in cm ² per animal (conventional cage) ('old' cages)	550	700	n.a.	550	550	550	550
Enhanced cage is required from	2012	2012	present	2012	2012	2012	2012
Is beak trimming allowed?	yes	no	no	yes	yes	yes	yes
Access to daylight required?	no	no	yes	no	no	no	no
Nest, perches and sand-baths	yes	no	yes	yes	yes	yes	yes
Maximum stocking density for broilers	-	34 kg/m ²	20 kg/m ²	-	-	34 kg/m ²	-
Litter bedding for broilers	-	yes	yes	-	-	yes	-

The following conclusions can be drawn from Table 20.2:

- The Scandinavian legislation for egg and poultry production goes well beyond EU requirements, especially the Swedish legislation. The UK legislation for poultry production is comparable to the Norwegian standards. Legislation in the other countries for egg and poultry production is at EU-level.
- The EU has no specific requirements for broilers; in accordance France, Italy, and the Netherlands have no such requirements either. The UK, Sweden and Norway, however, do have specific legislation for broiler production.
- As it turns out, from the participating EU-countries, the Swedish legislation is strictest for welfare of poultry and laying hens.

20.5 EUROPEAN AND NATIONAL REGULATIONS FOR THE CATTLE AND VEAL SECTOR

In the case of cattle, the European Union has only set specific standards for veal calves, viz. Directive 1997/2/CE, which is an amendment to Directive 1991/629/CE. Other cattle are supposed to be protected by Directive 1998/58/CE.

The discussion on the welfare of veal calves has been running for many years now. Many developments have taken place in the sector over the last decade. Nearly everywhere in Europe the old-fashioned system of 'box-housing' has disappeared, although individual housing of veal calves is still in practice. More and more veal farmers have started to house their calves in groups. Also precautions are taken increasingly to prevent anaemia, which is caused by malnutrition (too little fibrous fodder and iron). It used to be a widespread practice to feed veal calves milk products only, in order to produce a nice ('white') meat colour. A consequence of this was that many of these calves suffered from anaemia (= haemoglobin deficiency).

In 1991, Directive 1991/629/CE was agreed by the European Commission. This directive was the first European piece of legislation concerning the veal industry. The most important rules from this directive were the prohibition of keeping calves completely in the dark, the obligation to feed calves 'sufficient' amounts of iron, and some minimum size requirements to the boxes of the calves. Tethering and individual housing were still allowed. In 1997, Directive 1997/2/CE changed this situation. This directive orders that:

- All veal housing installations built before 1 January 1998 must comply with Directive 1991/629/CE until 1 January 2007, and after this date with Directive 1997/2/CE.
- All veal housing installations built after 1-1-1998 were to comply directly with Directive 1997/2/CE.

This directive implies that veal calves older than 8 weeks must be kept in groups, with at least 1,5 m² free space per calf (for the youngest calves < 150 kg) up to at least 1,8 m² per calf (for the oldest calves > 220 kg). Tethering is no longer allowed. Some countries have alternative legislation. Table 20.3 shows the level of the most important requirements in the six participating countries in comparison.

Some comments regarding welfare regulation for cattle other than veal:

- Not every participating country has specific requirements for dairy and beef production. There is no European welfare regulation for these sectors. Only the (general) Directive 1998/58/CE protects the welfare of dairy and beef cattle. In the UK, Norway and Sweden, however, there are specific regulations for these animals.
- There is currently a debate in the Netherlands about the question whether

pasturing of dairy cattle should be obliged by law. In Norway and Sweden, such a law implemented already.

TABLE 20.3 The most important minimum animal welfare requirements for veal production in the European Union (EU), Norway (N), Sweden (S), France (F), the Netherlands (NL), the United Kingdom (UK) and Italy (I).

	EU	N	S	F	NL	UK	I
Group housing required from	2007	present	present	2007	2007	present	2007
Minimum amount of fibrous fodder required (g/day)	50–250*	250	250	250	250	250	50–250
Minimum surface requirements (m ² /animal)							
- calves < 150 kg	1.5	1.5	1.5	1.5	1.5	1.5	1.5
- calves 150–220 kg	1.7	1.8	1.8	1.7	1.7	2.0*	1.7
- calves > 220 kg	1.8	2.0	1.8	1.8	1.8	3.0	1.8
Minimum average blood content of haemoglobin (mmol/liter)	4.5*	4.5	-**	4.5	4.5	4.5	4.5

Notes: * at least 2.0 m² for calves of 150–200 kg, and at least 3.0 m² for calves of 200 kg and more; ** production of white veal meat is forbidden in Sweden, these standards are for beef calves with well balanced diets.

Source: Commission Decision 97/182/EC of 24 February 1997 amending the Annex to Directive 91/629/EEC.

Some conclusions that can be drawn from Table 20.3 are:

- The UK and Norway have the strictest requirements for veal production. However, in fact there is hardly any veal production in Norway. In Sweden (white) veal production is totally forbidden.
- The requirements for veal production in France, the Netherlands and Italy, three of the largest veal producers in Europe, are more or less equal and the requirements are equal to those of the European Union.

20.6 CONCLUSION

It is clear that – in general – animal welfare legislation for production animals is strictest in Norway and especially Sweden, and much stricter there than the EU standards. The UK welfare legislation is well beyond European standards but not as strict as in Norway or Sweden, whereas welfare legislation in France and Italy is mostly at the EU level. The Dutch legislation takes a position between the EU and, more or less, the UK welfare legislation.

ANIMAL WELFARE SCHEMES

Apart from the official legislation, several certification schemes or programmes are operative in European agriculture to provide stricter organisation on one or more specific themes, such as food safety, traceability or animal welfare. Some of these schemes are 'animal welfare schemes'. In this section the most important animal welfare schemes in the six participating countries will be discussed. But first the term 'animal welfare scheme' will be defined.

21.1 THREE TYPES OF ANIMAL WELFARE SCHEMES

There has been some discussion as to the exact definition of an 'animal welfare scheme'. Apparently it is hard to find common ground for a clear definition even within these six countries. Therefore it has been agreed that an 'animal welfare scheme' is defined as 'any scheme that includes a module concerning animal welfare standards', but these standards do not necessarily have to differ from national or European standards. More specifically, three 'types' of animal welfare schemes were distinguished:

- 1 *Quality (farm) assurance schemes* are schemes which contain an animal welfare module, but focus on other themes than animal welfare, mostly on food safety, product quality and traceability. Their animal welfare standards do not necessarily have to differ from European or national standards. These schemes have most often been set up by agricultural industry or by public authorities. Examples: KSL (N), IKB (NL), BFS (UK), Label Rouge (F), CCP (F), QC, LAIQ (I).
- 2 *Specific animal welfare schemes* are schemes which focus specifically on animal welfare and claim to guarantee significant welfare improvement. Generally their animal welfare requirements go beyond European or national legislation, although. These schemes have most often been set up by private farmers or in some cases by NGO's. Examples: 'Freedom Food' (UK), 'Scharrel' (NL), 'Schweitzer-pork' (F).
- 3 *Organic schemes*: This is the only animal welfare scheme with a common European standards. It was originally set up by farmers. By definition, animal welfare is included in the organic scheme as a part of its basic production

philosophy. The scheme focuses on environmental health, food safety and quality, and animal welfare. Examples: KRAV (S), Debio (N), Soil Association (UK), Agriculture Biologique (F), SKAL (NL), AIAB, CCPB (I).

The categories and definitions serve to organize the animal welfare schemes which are to be presented in the next chapter. Among those are schemes in which ‘animal welfare’ as such plays only a minor role, but also schemes focusing explicitly on improving the welfare of animals. Those schemes have of course to be distinguished in order to understand how differently animal welfare may be dealt with in the different sectors and by different actors.

The third category is different in the sense that it is no scheme. Nevertheless, it makes sense to include organic agriculture and its regulations because of the following reasons:

- It is the only animal welfare scheme with common European standards (even legislation).
- It has higher standards than most of the other schemes, on many subjects.
- It is based on a philosophy, not so much on an (animal welfare) problem.
- It is a well-researched sub sector, also in a European perspective (in contrast to most of the other animal welfare schemes).
- It is hard to place organic production in either one of the two other categories, for it has not really a clear central aim (the aim of organic production focuses on the total system rather than parts of it). It also shares several features with both other categories. (In terms of marketing and market share it is comparable to many ‘specific animal welfare schemes’, but considering its multi-sector, multi-objective approach and its regulation structure, it is probably more comparable to ‘quality assurance schemes’, for instance.)

On the basis of the above observations it has been decided to regard organic production separately.

In the following sections, the quality assurance schemes, and the specific animal welfare schemes in the pig, poultry and cattle sectors of Norway, Sweden, the Netherlands, the United Kingdom, France and Italy are described and discussed. The first paragraph deals with the pig sector, the second paragraph with the poultry sector and the third paragraph with the cattle sector. Each paragraph starts with an overview of the national quality assurance schemes and then looks into specific animal welfare schemes. The description of the organic schemes will be discussed separately, in a later chapter.

21.2 WELFARE SCHEMES FOR PIGS

In the pig sector, some large-scale, business-led or quality assurance schemes are operative. These schemes mainly focus on food safety, veterinary hygiene, and traceability. Especially on the part of veterinary hygiene, some major developments have taken place over the last few years, due to the outbreak of some highly contagious pig diseases like Classical Swine Fever, Foot-and-Mouth Disease, and Aujeszky's Disease. These schemes generally do not include animal welfare regulations that go beyond the national or European legislation. Specific animal welfare schemes contain much stricter regulation on this subject.

21.2.1 QUALITY ASSURANCE SCHEMES FOR PIGS

In Norway, pig farmers can be certified by the KSL (Kvalitetssystem i landbruket – Quality System for Agriculture). This scheme is the most important quality assurance scheme in Norway, involving 68 % of all Norwegian farmers. The KSL is a multi-sector scheme, for that matter comparable to BFS in the UK, Label Rouge in France, and IKB in the Netherlands, which will be described below. KSL was set up by the agricultural industry in cooperation with agricultural authorities, which is typical for the corporatist style in which Norwegian agriculture is organised. The vast majority of the Norwegian farmers participate in KSL, namely 68 % of them, and they represent 78 % of the joint agricultural land in use. Of all meat producers (incl. pig farmers) 81 % has joined KSL.

In the UK the BFS (British Farm Standard) is the most important quality assurance scheme. It is an industry-led scheme covering 65–90 % of total production (dependent on the sector). The BFS sub-scheme for pig industry is called 'Assured British Pigs'. Nearly 2,200 pig farmers in England and Wales have joined this scheme, which covers about 90% of all pig production. In Scotland the pig sub-scheme is called 'Quality Meat Scotland Farm Assurance' (or actually the QMS sub-scheme Specially Selected Farm Assurance). Virtually all Scottish pig producers have joined this scheme. The 'Northern Ireland Pig Assurance Scheme' is the pig assurance scheme for Northern Ireland. These sub-schemes for pig husbandry contain extra requirements on top of national legislation. The most important (and restraining) is the ban on castration without anaesthetics.

The situation in the Netherlands is comparable to the UK. IKB (Integrale Keten Beheersing – Integral Chain Management) is by far the most important quality assurance scheme with coverage among pig farmers of nearly 100 %. The sub-schemes for the pig sector 'IKB-Varken' and 'IKB-2004+' are very similar and practically interchangeable (they were set up by two competing organisations). IKB focuses mainly on food safety and veterinary hygiene. The animal welfare module complies with national legislation. A second Dutch quality assurance scheme for pork is initiated by the largest pork processing company, 'Dumeco' (Bestmeat, VION), and called 'Good

Farming Welfare'. Traceability and food safety are among the main aims of this programme, but animal welfare plays an important role as well. Approximately 50% of all Dutch pig farmers participate in this scheme, on top of their participation in IKB. The requirements for animal welfare are a bit stricter than national legislation. Some sub schemes of 'Good Farming Welfare' go well beyond this standard. One of them, which is designed for bacon production for the British market, does not allow castration, for instance.

In France the situation is a bit different. Here, two large quality assurance schemes are operative in the pig sector. The first one is Label Rouge. This is the smaller scheme of the two, with a coverage of 1.3 % of total French pig production (570 producers). Label Rouge focuses strongly on high, distinctive quality. In fact, there are two types of Label Rouge in pig production:

- Label Rouge for indoor kept pigs, with animal welfare requirements are a little beyond national legislation.
- The 'Farm' Label Rouge with high animal welfare requirements, like production on straw and free range. Examples of sub-schemes of 'Farm Label Rouge' are: Porc Fermier d'Auvergne (60 producers), and Porc Fermier d'Argoat (68 producers).

The other French quality assurance scheme is called CCP (Certification of Product Conformity). This scheme covers about 21% of total French pig production and focuses on food safety and traceability. It has no specific animal welfare requirements beyond national legislation.

In Sweden, the first main quality assurance scheme is called MHS (Miljöhusensyn – Environmental Inspection), a multi-sector self-regulation programme, which also contains animal welfare requirements. Around 50 % of all Swedish farmers (responsible for ca. 90 % of all production) comply with the MHS criteria, which are equal to national standards. Another important Swedish quality assurance scheme for the pig industry is called SvDhv (Svenska Djurhälsovården – Swedish Animal Health Care). Around 15% of the Swedish pig farmers participate in this programme, which is mainly focussed on animal health, but it also contains animal welfare regulation. It is meant to help farmers to optimize their animal health status and thus improve their production. To participate in this scheme a Swedish farmer has to comply with MHS first. Apart from SvDhv and MHS Sweden has many other quality assurance schemes for pig production. These are generally set up by private slaughterhouses. The SvDhv and the MHS schemes are prerequisites to most of them. The scheme of 'Swedish Meats', a cooperative slaughterhouse, is the most important. It covers the majority of the Swedish pig production, with over 3,000 participants. Three 'Swedish Meats' sub-schemes are specific for the pig sector, and they are called BAS, BIS and BIS+. The welfare requirements for BAS are on national legislation level. The welfare requirements for BIS and BIS+ are a little beyond this level.

Besides Swedish Meats, there are many other, smaller schemes, initiated by private slaughterhouses, with special requirements for animal welfare. Examples of these are 'SwedeHam+' of the Skövde slaughterhouse and the 'Gårdscertifiering' by Ugglarp

slaughterhouse. Another important slaughterhouse is ‘KLS Livsmedel’ which is owned by farmers like Swedish Meats. Together with Swedish Meats, KLS Livsmedel is responsible for nearly 70% of the Swedish market. As a final example, there is the SLP slaughterhouse, which runs the schemes SLP-gris, SLP-plus, and Treras. However, there are many others, but smaller, private slaughterhouses which run their own animal welfare scheme(s).

Italy, in comparison, distinguishes itself in terms of quality assurance schemes in the pig sector as the majority of pigs is raised according PDO and PGI product specification.²² A rough estimation indicate that about 85% of the pigs are slaughtered at 160 kg live weight. The PDO and PGI labels cover 70% of the total pig production accounting for 28 different products (i.e. Parma Ham or San Daniele Ham). These schemes are ‘quality assurance schemes’ in terms of traceability, feeding and many other requirements. In these PDO/PGI product specifications, there is not a specific chapter on animal welfare given that the farmers have to comply with the national standards in force on that subject. Therefore, they have not been included in this report. An exception is a regional quality assurance scheme called ‘Qualita Controllata’ (QC – Controlled Quality). This voluntary scheme based on the concept of integrated production, however, functions as an ‘umbrella’ for a list of animal and vegetable products and, at present, there is no record of any local animal welfare scheme for pork. One, fairly new, regional initiative, is the ‘Agriquality’ scheme, also known as ‘white butterfly’ (the logo represents a white butterfly). This is a multi-sector quality assurance scheme which includes a strict chapter on animal welfare. Farmers have to comply immediately with the EU regulations of 2013 with no time derogation.

Finally a third exception, even younger still, was set up by the Italian environmental league ‘Legambiente’. The scheme is called ‘LAIQ’. Its aim is to preserve a traditional way of production. It has sub-schemes for many agricultural production sectors, and the requirements for pigs are slightly stricter than the Italian national legislation. The LAIQ pig production the schemes exists but has no participants yet (see Table 21.1) because most of the pig producers are already involved in PDO/PGI schemes. Probably pig producers will join these new schemes when consumers’ concern on animal welfare will increase.

21.2.2 SPECIFIC ANIMAL WELFARE SCHEMES FOR PIGS

When it comes to specific animal welfare schemes in the pork sector, schemes exist throughout four of the six participating countries, but none are recorded in Sweden and Italy. In Sweden, the pig sector is relatively small, and consumers in this country tend to trust their pork to be welfare friendly produced. In Italy, consumer concern about animal welfare is relatively low. Since many Italian PDOs and PGIs do not welfare requirements bar basic legislative requirements, they were excluded from this report.

²² PDO = Protected Designation of Origin; PGI = Protected Geographical Indication. According to Regulation 2081/92 which offers the opportunity to recognise and label a product whose quality is linked to human and natural factors of a specific geographical environment.

TABLE 21.1 Overview of animal welfare schemes in the pig sector in Norway (N), Sweden (S), Italy (I), France (F), the Netherlands (NL) and the United Kingdom (UK).

Scheme	Type	No. of participants	% of participants	Initiator	Welfare requirements
KSL	N	QAS	81	government + sector	0
BFS	UK	QAS		farm industry	+
- Assured British Pigs			c. 90		
- Quality Meat			c. 100		
Scotland					
- N.I. Pig Assurance					
IKB	NL	QAS	c. 100	business	0
Good Farming Welfare	NL	QAS	c. 50	business	+
CCP	F	QAS	3,800	sector	0
Label Rouge ('indoor')	F	QAS	570	sector	+
Label Rouge ('farm')					++
Miljöhusesynd (MHS)	S	QAS		government + sector	0
SvDhv	S	QAS		government + sector	+
Swedish Meats	S	QAS	c. 3,000	business	0 / +
Other slaughterhouse schemes, f.ex.	S	QAS		business	
- SLP			c. 8		0 / +
- Skövde			c. 7		+
- Ugglarp			c. 5		0
- KSL Livsmedel			c. 7		0
Qualita Controllata	I	QAS	0	Government + farmers	0
Agriquality	I	QAS	0	Government + farmers	+
LAIQ	I	QAS	0	NGO	+
Thierry Schweitzer	F	SAW	5	farmers	++
Freedom Food	UK	SAW	500	RSPCA (NGO)	++
Scharrel	NL	SAW	35	farmers	++
Grøstadgris	N	SAW	1	farmer	++

Notes: QAS=quality assurance scheme; SAW=specific animal welfare scheme; Welfare requirements: 0=at the level of national legislation; +=a little beyond national legislation; ++=well beyond national legislation.

In Norway there is record of one specific animal welfare scheme initiative which focuses on pig production. It is called 'Grøstadgris', and it markets three types of special welfare pigs (i.e. free-range pigs, 'forest' pigs, and 50% wild boar pigs, which also roam in the forests). This is a rather small initiative, however, and the overall impression is that Norwegian consumers, like the Swedish, are pretty confident about the level of the animal welfare situation in their national livestock sector. Animal welfare is therefore not really considered an issue.

In France there is only one very small initiative of this type: the trademark of 'Thierry Schweitzer' in which only five producers participate. This scheme has far-reaching requirements concerning animal welfare. However, quality production is an important objective of this scheme too.

The main specific animal welfare scheme in the UK is the so-called 'Freedom Food' scheme, in which over 500 pig farmers participate. This scheme was set up by the RSPCA (animal protection NGO) and has as its main objective to improve the lives of as many farm animals as possible. The programme contains high animal welfare standards.

In the Netherlands the 'Scharrel' scheme can be compared to 'Freedom Food'. Its main focus is animal welfare, but only about 35 pig farmers participate in this scheme. The welfare requirements go far beyond national legislation.

Table 21.1 presents an overview of the animal welfare schemes mentioned in this chapter.

21.3 WELFARE SCHEMES FOR POULTRY

The importance of the poultry sector varies greatly between the six participating countries. In Norway and Sweden, for instance, the poultry sector is hardly of any importance, with only very few producers operating relatively small farms (< 5.000 hens). In other countries such as France, Italy or the Netherlands, egg- and poultry production is significantly more important. Countries with a large egg and poultry sector have put more effort into the development of more elaborated quality assurance or animal welfare schemes than countries with a small egg and poultry sector.

21.3.1 QUALITY ASSURANCE SCHEMES FOR POULTRY

In France there are two large quality assurance schemes operative in the egg and poultry sector, again (as in the pig sector) Label Rouge and CCP (Certification of Product Conformity). Label Rouge covers approximately 3% of total egg production, and a little over 35% of total poultry production. CCP covers nearly 10% of total egg production, and about 15% of the poultry production. Label Rouge aims at distinctively high quality production, and its welfare requirements are well beyond national legislation (free range, low densities). It holds several (local) sub-schemes, such as Loué, Licques (white chicken) and Gers (orange chicken). CCP, on the other hand, aims for traceability and food safety. The animal welfare standards of CCP generally are not beyond national legislation, although there is a special 'Free Range' CCP scheme for egg producers, which includes additional requirements. Apart from these two large quality assurance schemes, there is a third QAS for poultry, called 'Volaille de Bresse', which is a very famous local PDO sub-scheme (protected origin), but also quite small. It contains specific welfare aspects, such as free range.

In the Netherlands, the egg and poultry sector are largely covered by sub-schemes of the IKB quality assurance scheme (as in the pig sector). In the egg sector the scheme is called IKB-Ei, and this scheme is also divided in a few sub-schemes. One sub-scheme – the ‘Kooi-ei’ scheme – focuses on food safety, veterinary hygiene and traceability, and it can therefore be qualified as a true quality assurance scheme. Approximately 50% of all egg producers are assured according to the ‘Kooi-ei’ (cage egg) scheme. The other two sub-schemes of IKB-Ei (IKB egg) are called ‘Scharrel’ (free range indoor) and ‘Vrije uitloop’ (free range outdoor). These schemes focus specifically on animal welfare and are therefore to be qualified as specific animal welfare schemes, although they are sub-schemes of IKB. The ‘Kooi-ei’ scheme does not include welfare regulations that go beyond national legislation. Another IKB scheme is operative in the Dutch poultry sector: ‘IKB-Kip’. This scheme covers nearly 95% of all poultry producers in the Netherlands. The animal welfare module does not contain any additional regulation to the national legislation.

In the UK, the BFS scheme also includes a special sub-scheme for poultry: ‘Assured Chicken Production Scheme’. More than 80% of the total British chicken production is covered by this scheme. Assured Chicken has its own code of practice which goes beyond the national legislation. The code includes specific standards for breeder replacement, breeder layers, hatchery, chickens, free range and poussin. Two other UK schemes are relevant to egg production: ‘Lion Quality Mark’ and ‘Laid in Britain’. Lion Quality Eggs currently account for over 80% of the British egg market.

In Sweden the most important quality assurance scheme for egg production is called ‘Svenska Ägg’ (‘Swedish Egg’). As for the poultry sector, this is covered by the ‘Swedish Poultry’ scheme. At the moment about 95% of all professional Swedish egg producers are participating in Swedish Eggs, and about 99% of the professional poultry producers participate in Swedish Poultry. Both programmes contain welfare requirements that are well beyond national legislation. Farmers who want to participate need to comply with the above mentioned MHS scheme.

In Norway, KSL is also applicable to the egg and poultry sectors. The majority of the farmers participate in this scheme. Its animal welfare module does not go far beyond national legislation, however, but Norwegian regulations are much stricter than EU-directives.

In Italy some of the biggest egg producers have started to produce eggs according to Directive 1999/74/EC. The objective of the directive is mainly labelling but also free-range and barn eggs production. In these two systems the animal welfare requirements go beyond basic legislative requirements. A rough estimation by AVITALIA (a poultry association) indicates that 1.6% of the egg production follows the barn egg scheme while free-range eggs account for 0,1% of production. Moreover, farmers have the option to join the Umbrella schemes for integrated production such as ‘Agriquality’ (white butterfly), QC (Qualità Controllata) and the ‘Legambiente’ schemes containing specific requirements for egg farming. At the moment only two big farms have joined the QC scheme, labelling 15 million eggs, while the Agriquality is not yet operative in animal production. The Legambiente scheme LAIQ labelled only 200,000 eggs in 2003.

21.3.2 SPECIFIC ANIMAL WELFARE SCHEMES FOR POULTRY

Some of the specific animal welfare schemes in the egg and poultry sector have already been mentioned, but they need additional explanation. Some others still have to be mentioned.

In France, the already mentioned CCP-sub-scheme for free range eggs can be qualified as a specific animal welfare scheme. Its main aim is improved animal welfare, and the animal welfare requirements of this scheme are well beyond national legislation.

In the Netherlands there are some specific animal welfare schemes for eggs and poultry. 'Scharrel' eggs and 'Vrije uitloop' eggs were already mentioned above. These represent respectively 45% and 2.5% of total production, and have standards well beyond national legislation. There is also a 'Scharrel' scheme for poultry, but this covers less than 1% of total poultry production. Finally, there is the so-called 'Gras-ei' scheme (grass egg), which contains strict animal welfare rules, but covers less than 1% of total production.

In Italian egg production, some of the poultry producers have started to produce broilers in alternative systems according to EU Regulation 1538/91. This regulation on poultry meat labelling defines four different labels according to a detailed set of production specifications which go beyond the basic legislative AW requirements. The four labels, corresponding to four different production systems are: extensive indoor, free range, traditional free range, free range-total freedom. These labels and systems can be applied directly by producers, or the retailer can ask the farmers to produce according the product specifications indicated in the law. The poultry association AVITALIA estimates that in Italy about 5–6% of the poultry meat is produced according to the above mentioned schemes. With regard to the others umbrella schemes, QC do not have product specifications about broilers, and the LAIQ scheme reports that about 6 million broilers were slaughtered under this scheme in 2003.

In Norway and Sweden there is no record at all of any specific animal welfare scheme for eggs or poultry, though the above mentioned programmes 'Swedish Eggs' and 'Swedish Poultry' are in the fringe area of being specific animal welfare schemes.

In Britain the 'Freedom Food' scheme also applies to chicken production. Nearly 60 (about 2% of total production) chicken producers have joined this scheme, and comply with strict regulation concerning animal welfare. Table 21.2 gives an overview of the animal welfare schemes in the egg and poultry sector.

TABLE 21.2 Overview of animal welfare schemes in the egg and poultry sector in Norway (N), Sweden (S), Italy (I), France (F), the Netherlands (NL) and the United Kingdom (UK).

Scheme	Type	Nr of participants	% of participants	Initiator	Welfare requirements
<i>Eggs</i>					
CCP	F		c. 4	sector	0
Label Rouge	F	c. 200	c. 3	sector	++
IKB Kooi-ei	NL		c. 50	business	0
Qualita Controllata	I	2	0.1	government + farmers	+
Legambiente	I		< 0.05	NGO	0
Agriqualita	I	0		government + farmers	+
Lion Quality Egg	UK	1,200	> 80	agricultural industry	+
Swedish Eggs	S		c. 95	business + farmers	++
KSL	N		> 75	government + sector	0
Scharrel	NL		c. 45	farmers + business	+
Vrije uitloop	NL		c. 2.5	farmers + business	++
Gras-ei	NL		< 1	farmers	++
CCP Free range	F		10	sector	+
Free range eggs	I		0.1	?	+ / ++
<i>Poultry</i>					
CCP	F	2,500	15	sector	0
Label Rouge	F	5,300	35	sector	++
IKB-Kip	NL		c. 95	business	0
BFS Assured Chicken	UK		> 80	business	+
KSL	N		> 75	government + sector	0
Swedish Poultry	S		c. 99	business + farmers	++
Legambiente	I		1.4	NGO	0
Agriqualita	I	0		government + farmers	+
Several schemes	I		c. 5-6	farmers	+ / ++
Scharrel	NL		< 1	farmers	++
Freedom Food	UK	60		RSPCA (NGO)	++

Notes: QAS=quality assurance scheme; SAW=specific animal welfare scheme; Welfare requirements: 0=at the level of national legislation; +=a little beyond national legislation; ++=well beyond national legislation.

21.4 WELFARE SCHEMES FOR CATTLE AND VEAL

To give an overview of the animal welfare schemes in the cattle sector is a complicated job as the cattle sector consists of three interlinked sectors: dairy, beef and veal. In addition, the cattle sector is the most important livestock sector in all six participating countries in terms of total revenue, and number of farmers.

21.4.1 QUALITY ASSURANCE SCHEMES FOR CATTLE AND VEAL

After the BSE crisis, many Italian cattle producer associations have started to promote quality assurance schemes (more than 70) in order to improve the traceability of their products and to demonstrate to consumers that the animal were bred in Italy. In 2002, about 5,500 on 16,800 total beef farms joined one of these schemes. Among the large number of QAS corresponding to specific labels, only few included animal welfare requirement in their production specifications. Examples of these schemes are 'Eletta', 'Vitellone di Qualita' and 'Coalvi'. At the moment it is difficult to know how many farms are joining these three QAS and how many animals are slaughtered but the number is probably very limited.

The above mentioned QC scheme (a regional 'umbrella' quality assurance scheme) covers some schemes for beef as well. The QC scheme has rules that go well beyond the national minimum. There are about 200 farms producing under QC label and about 10,000 bulls have been slaughtered under this label in 2003, most of them of the Romagnola breed.

The other regional quality assurance scheme which was already mentioned above, 'Agriqualita' (white butterfly) contains requirements for veal, beef and dairy production. For veal production, farmers will have to comply with the EU regulation for 2006 immediately. Production, according to this regulation will start in 2005.

The same applies to the 'Legambiente' LAIQ scheme (environmental league scheme). There are specific requirements for beef, dairy, veal (three sub-schemes) and even buffalo raising. In general the Legambiente rules are similar or just slightly beyond national requirements. The Legambiente regulation for the veal schemes is different; this regulation goes well beyond national laws. In 2003, about 2,000 steers were slaughtered and 50,000 tons of milk were produced under LAIQ label.

In Norway, the dairy sector is by far the most important sector. The above mentioned KSL quality assurance scheme covers about 90% of total dairy production (87% of all dairy farmers participate) and about 80% of beef production (81% of all beef producers), but does not impose any extra animal welfare requirements to the producers. There is no specialised veal production in Norway.

Swedish cattle producers (dairy, beef and veal) can join either 'Frisk Ko' (Healthy Cow) or 'Swedish Meats' (or both), and also several specific schemes for beef, initiated by private slaughterhouses. Frisk Ko is run by the dairy cooperative 'Swedish Milk' (Svensk Mjöl) and it covers 99% of the Swedish milk market. Also farmers can participate in SvDhv (mentioned before in the pig section). Farmers who want to participate in SvDhv, Swedish Meats or Frisk Ko have to comply with the requirements of MHS first (see above). The welfare requirements for these schemes are similar to national legislations. Veal production in Sweden is virtually absent, and production of white veal is forbidden. Furthermore, there are several regional schemes for cattle, and in some cases they include welfare requirements. An example of this type is 'Kaprifolkött'. However, these schemes only have very little market shares.

In France there are several animal welfare schemes for dairy cattle, beef cattle and veal calves. In all 3 sectors the above mentioned CCP (Certification of Product Conformity) scheme is operative. The requirements do not go beyond European legislation, although some special CCP schemes have additional animal welfare requirements. For the beef sector, the market share of CCP is approximately 20% of total production, for the milk sector it is less than 1%. The Label Rouge scheme is also operative in the dairy, veal and beef sectors, and focuses on high quality production. Over 10% of total beef production is labelled with Label Rouge, but only very few dairy farmers have joined Label Rouge. The animal welfare requirements of Label Rouge for beef and dairy do not go far beyond the European regulations.

Two other quality assurance schemes are operative in the French cattle sector. The first one is called CBPE (Charter of Good Practices in Cattle Breeding) which is also applicable to the beef and dairy sectors. The central aim of this scheme is quality assurance and to guarantee the quality of the farmer's work. Its animal welfare requirements are a little beyond EU regulation level. Over 110,000 producers (beef and dairy) have joined this scheme so far. The Charter also constitutes the technical base of all the CCP and labels in the cattle sector. The second one is the AOC/PDO (label of controlled origin) which is a government scheme for certification of guaranteed origin. Over 20% of total added value in the French cheese market is sold with this label, but less than 1% of all marketed beef is AOC certified. The AOC/PDO scheme focuses on quality production, traceability and tradition, but for animal welfare the requirements are the ones of the Charter (CBPE scheme).

For veal production in France, the CCP scheme is the most important quality assurance scheme (60% of all producers). Apart from being a general quality assurance scheme, the CCP scheme also 'hosts' some special 'extra' quality assurance schemes, and these sometimes do have extra requirements for animal welfare. Examples of these schemes are CCP-Sofivo (250 producers), CCP-CEVAP (38 producers) and CCP-Les Vitelliers (1500 producers). Finally there are two more French schemes for veal production that need to be mentioned here. They are both sub-schemes of Label Rouge and represent around 6000 producers together. The most important of the two has no specific animal welfare requirements (only that the calf must be kept with its mother). Following the other scheme (called 'veau de l'Aveyron') the calf remains with his mother during his life, grazing in pastures.

In the Netherlands, the earlier mentioned IKB scheme covers specific sub-schemes for beef (IKB-Rund) and veal (IKB-Vleeskalveren), but not for dairy production. Concerning IKB, the animal welfare requirements are equal to national legislation, its main objectives being traceability, food safety and veterinary hygiene. Approximately 90% of all Dutch beef producers participate in IKB-Rund, whereas over 95% of all veal producers have joined IKB-Vleeskalveren. Two other quality assurance schemes in the Dutch veal sector were initiated by the 'Van Drie Groep', a large company in the veal sector. These two schemes are called 'Group Grown' (for 'white' veal) and 'Friander' (for 'rosé' veal), and they require extra animal welfare measures, concerning mainly feed, light and ventilation. They also require group housing (which is legally required from 2007 onwards).

For the Dutch dairy sector the main quality assurance scheme is called KKM ('Keten Kwaliteit Melk' – Chain Quality Milk) although the future of this scheme is rather insecure. In 2002 over 90% of all Dutch dairy farmers participated in this scheme, which is mainly concerned with product quality and safety. It does not demand extra measures on behalf of animal welfare, although it does contain a module called 'animal welfare'.

In the United Kingdom, the earlier mentioned British Farm Standard (BFS) integrates several quality assurance sub-schemes for cattle and mainly for beef production. Most of these sub-schemes are oriented towards a specific region, such as 'Farm Assured Welsh Livestock' (40% of the Welsh beef herd – 6,200 members), 'Northern Ireland Farm Quality Assurance Scheme' (> 75% of Northern Ireland beef cattle – 11,150 farms), and 'Quality Meat Scotland Farm Assurance' (90% of all Scottish beef cattle). In addition there is the 'National Dairy Farm Assurance' scheme for the British dairy sector with 16,500 participants covering over 85% of British milk production, and the 'European Food Safety Inspection Service and Farm Assured British Beef and Lamb' with over 15,000 participating British producers (including 37% all British beef producers), which are also partners in the BFS. All these schemes have common main objectives, i.e. quality production and food safety and also animal welfare, and the fact that they were initiated by retailers and meat processors. Animal welfare is quite important in these schemes, but goes only slightly a bit beyond national animal welfare legislation.

21.4.2 SPECIFIC ANIMAL WELFARE SCHEMES FOR CATTLE AND VEAL

In 2002 a specific animal welfare scheme was founded for the Dutch dairy sector by a cheese-factory called 'CONO', being concerned about the fact that more and more farmers decide to no longer graze their cattle. Approximately 2% of all Dutch dairy farmers have joined this scheme, which demands that they graze their cattle for an extra bonus of €0.005 on top of the milk price. In addition there is one specific animal welfare scheme for veal in the Netherlands, called 'Peter's Farm', which was initiated by another important company in the veal sector – 'Alpuro'. Approximately 40 veal farmers have joined this scheme, which demands a range of extra animal welfare measures, such as extra space, availability of toys, and group housing.

Finally, there is one specific animal welfare scheme for the Dutch beef sector, called 'scharrel' (free range), in the same range as 'scharrel' poultry and 'scharrel' pigs, which were mentioned above. Not many beef producers have joined this scheme, about 10–15, but this number is growing. The scheme's requirements are well beyond national legislation.

In the UK there is the 'Freedom Food' scheme, a specific animal welfare scheme, which was also described for poultry and pigs. Approximately 650 UK beef farmers and 250 dairy farmers participate in 'Freedom Food'. They have to comply with strict animal welfare rules.

TABLE 21.3 Overview of animal welfare schemes in the dairy, beef and veal sector in Norway (N), Sweden (S), Italy (I), France (F), the Netherlands (NL) and the United Kingdom (UK).

Scheme	Type	Nr of participants	% of participants	Initiator	Welfare requirements	
<i>Dairy</i>						
CCP	F	QAS	700	< 1	sector	0
Label Rouge	F	QAS	3,400	c. 3	sector	0 / +
KKM	NL	QAS		c. 90	sector + business	0
KSL	N	QAS		c. 90	government + sector	0
AOC	F	QAS	25,000	c. 15–20	farmers + government	0 / +
CPBE	F	QAS	c. 60,000	60	farmers + sector	0 / +
Frisk Ko	S	QAS		c. 99	sector + farmers	0
Koe-in-de-wei / CONO	NL	SAW		c. 2	business	+
BFS - NDFA	UK	QAS		> 85	business	0
Freedom Food	UK	SAW	250		RSPCA (NGO)	++
Legambiente	I	QAS		0.4	NGO	
<i>Beef</i>						
CCP	F	QAS	35,000	c. 20	sector	0
Label Rouge	F	QAS	17,200	10	sector	0
AOC	F	QAS	83	< 1	farmers + government	0 / +
CPBE	F	QAS	c. 50,000	50	farmers + sector	0 / +
Eletta	I	SAW	?		farmers	++
Vitellone	I	SAW	?		farmers	+
Coalvi	I	SAW	?		farmers	0
Qualita Controllata	I	QAS	?	0.4	government	0
Legambiente	I	QAS		0.08	NGO	
KSL	N	QAS		> 75	government + sector	0
Swedish Meats	S	QAS		?	business	0 / +
Several slaughterhouse schemes	S	QAS			business	
- KLS Livsmedel				c. 10		0
- Skövde				c. 7		0
- Ugglarp				?		0
- SLP				?		
IKB-Rund	NL	QAS		c. 90	business	0
Scharrel	NL	SAW	c. 10–15		farmers	++
BFS – several aws	UK	QAS		40–90	business	0 / +
Freedom Food	UK	SAW	c. 650		RSPCA (NGO)	++
<i>Veal</i>						
CCP	F	QAS	3,000	60	sector	0
CCP – SOFIVO	F	SAW	c. 250		farmers + business	++
LR Veau sous la mère	F	QAS	6,000		farmers + business	+
LR Veau de l'Aveyron	F	QAS	c. 200		farmers + business	++
IKB Vleeskalveren	NL	QAS		c. 95	business	0
Group Grown	NL	QAS	?		business	+
Friander	NL	QAS	?		business	+
Agriqualita	I	QAS	?		government + farmers	+
Legambiente	I	QAS	?		NGO	++
Peter's Farm	NL	SAW	c. 40		business	+
BFS	UK	QAS	?		business	0

Notes: QAS=quality assurance scheme; SAW=specific animal welfare scheme; Welfare requirements: 0=at the level of national legislation; +=a little beyond national legislation; ++=well beyond national legislation.

There is no record of specific animal welfare schemes for dairy, beef or veal in France, Italy, Norway and Sweden.

21.5 A COMPARATIVE REVIEW OF ANIMAL WELFARE SCHEMES

To be able to compare national animal welfare schemes, it is necessary to consider the actual requirements in the schemes. In the following paragraphs an attempt is made to compare some of the most important animal welfare schemes that were discussed above. Many of the large quality assurance schemes are in fact multi-sector schemes. In the tables below these multi-sector schemes are compared.

Table 21.4²³ compares several quality assurance schemes regarding pig welfare requirements. As it turns out, most of the requirements of these schemes are equal to those of their respective national legislations. There are some differences though. Nevertheless, most of the conclusions that were drawn from Table 20.1 are applicable here as well. Only the Italian ‘Legambiente’ scheme clearly takes a middle position here, well beyond the Italian national legislation.

Table 21.5 compares the quality assurance schemes for poultry and egg production. Again the Swedish schemes clearly stand out, and again many schemes follow just the national legislation. It is remarkable that not all schemes have requirements for the maximum stocking density of broilers. The French Label Rouge scheme which is represented in this table is the stricter ‘Farm’ Label Rouge. This scheme, for instance, also requires an outdoor free range area for the laying hens.

Finally, Table 21.6 compares the major quality assurance schemes for cattle husbandry. Here, some schemes contain ‘extra’ requirements on top of their national legislation, and there are some distinctive differences. Especially the varying requirements for grazing (or not) are remarkable. The Italian ‘Legambiente’ scheme, for instance, requires grazing for veal calves, but not for dairy cows. Perhaps some schemes just assume dairy cows are always grazed, so there would be no need to require this specifically.

²³ In Tables 21.3-7, the column ‘welfare requirements’ needs some additional explaining. The indicated levels refer to a comparison with the national welfare legislation. So, one should realise, for example, that a ‘++’ indication for an Italian scheme does not necessarily mean that this scheme has higher welfare standards than a Swedish scheme which is indicated with ‘0’. The indications refer to the difference between the welfare standards of the scheme and the welfare standards within the respective countries (in this case Italy and Sweden). And as the Swedish welfare legislation is much stricter than the Italian (as explained in Chapter 19) it is not possible to make a just comparison between both schemes only on the basis of the indication in the column ‘welfare requirements’.

TABLE 21.4 Overview of quality assurance schemes for pigs in Norway (N), Sweden (S), Italy (I), France (F), the Netherlands (NL) and the United Kingdom (UK).

Quality assurance scheme	Country	Group housing for sows required from	Straw (fattening pigs) required	Non-anaesthetised castration allowed	Surface requirements for fattening pigs	Tail-docking allowed
Label Rouge (indoor)	F	2013	no	yes	EU + 20%	yes
CCP	F	2013	no	yes	EU	yes
IKB	NL	2008	no	yes	EU + 10%	yes
BFS	UK	present	yes	no	EU	yes
KSL	N	present	yes	no	EU + 10%	no
Swedish Meats (BAS)	S	present	yes	yes	EU + 30%	no
LAIQ	I	2006	yes	yes	EU	yes

TABLE 21.5 Overview of quality assurance schemes for poultry in Norway (N), Sweden (S), Italy (I), France (F), the Netherlands (NL) and the United Kingdom (UK).

Quality assurance scheme	Country	Abolition laying battery in	Beak trimming allowed	Surface requirements for laying hens	Surface requirements for broilers	Nest, perches and sand-baths for laying hens	Litter bedding for broilers
Label Rouge (farm)	F	present	no	>> EU	?	yes	yes
CCP	F	2012	yes	EU	-	no	no
IKB	NL	2012	yes	EU	-	no	no
BFS & Lion Quality Eggs	UK	2012	yes	EU	38 kg/m ²	no	yes
KSL	N	2012	no	EU + 25%	34 kg/m ²	no	yes
Swedish Eggs & Swedish Poultry	S	present	no	EU + 35%	20 kg/m ²	yes	yes
LAIQ	I	2012	yes	EU	30 kg/m ²	no	yes

TABLE 21.6 Overview of quality assurance schemes for cattle in Norway (N), Sweden (S), Italy (I), France (F), the Netherlands (NL) and the United Kingdom (UK).

Quality assurance scheme	Country	Veal group housing required from	Grazing for dairy cows required	Grazing for beef cattle required	Grazing for veal calves required	Veal calves on straw
Label Rouge	F	present	yes	yes	yes	yes
CCP	F	2007	no	yes	no	no
IKB & KKM	NL	2007	no	no	no	no
BFS	UK	present	no	?	?	no
KSL	N	present	yes	yes	yes	yes
Swedish Meats & Swedish Milk	S	present	yes	yes	yes	yes
LAIQ	I	present	no	yes	yes	yes

The above presented comparison is a preliminary one, based on few criteria and the tables are far from complete. France, for example, has several sub-schemes with stricter criteria than the ones mentioned in the tables. The same applies to some of the sub-schemes of IKB, Legambiente or BFS.

21.6 ORGANIC SCHEMES

As mentioned above, the organic schemes are the only animal welfare schemes with common European regulation (Directive 1999/1804/CE). Therefore we may assume that ‘organic production’ has an equal meaning in terms of production in all six EU countries (officially, the member states are free to impose additional regulation to their organic producers, and in some cases they have done so accordingly). Nevertheless, organic production is structured in different schemes:

- UK: Soil Association, others;
- France: Agriculture Biologique, Ecocert, others;
- Sweden: KRAV;
- Norway: Debio;
- the Netherlands: SKAL;
- Italy: 15 national or regional certification bodies.

The level of participation and the growth of the organic sector has been documented relatively well in all six countries. In Table 21.7 the percentage of organic farmers as part of the total number of producers are given for each livestock sector.

TABLE 21.7 Percentage of organic farmers compared to the total number of farmers in six livestock production sectors in Norway, Sweden, France, the United Kingdom, the Netherlands, and Italy.

	Pig production	Egg production	Poultry production	Dairy production	Beef production	Veal production
N	< 1%	1.5%	< 1%	< 1%	< 1%	-
S	< 1%	14%	< 1%	5%	?	-
F	< 1%	3%	< 1%	2%	< 1%	< 1%
UK	< 2%	< 4%	< 1%	4.1%	< 2%	-
NL	< 1%	7%	2.1%	1.4%	5.9%	< 1%
I	< 1%	< 1%	< 1%	< 1.5%		< 7%

Note: The UK figures represent the percentage of organic animals in the total herd.

THE POLITICAL AND SOCIAL CONTEXT OF ANIMAL WELFARE

It is extremely important to consider the political and social context in animal welfare research. When comparing the animal welfare situation in different countries, it is essential to take into account that the 'levels' of the national legislations can be quite different, which is shown in Chapter 19 on animal welfare legislation. In addition, the importance of the different sectors should be taken into account. To give an example: the Dutch and French pig sectors are relatively large, with nearly 10,000 and 16,000 pig farmers respectively, whereas in Sweden only about 3,500 pig farmers are operative. This has major implications for the national debate on animal welfare in pig husbandry in the Netherlands, France or Sweden.

Generally, citizens of the northern countries (Sweden, Norway, the Netherlands and the United Kingdom) appear to be more concerned with animal welfare than citizens of France or Italy. In these southern countries, people seem to be more indirectly concerned with animal welfare, as they are especially interested in food quality, for the production of which good animal welfare is assumed to be a prerequisite.

In France, for instance, people are specifically worried about the (assumed) industrialisation process in agriculture. Agricultural industry is supposed to produce 'bad' food, in opposition to more artisan traditional types of agricultural production, which is supposed to produce high-quality, high-value products. Animal welfare is, in this view, linked to food quality, since the general idea is that animal welfare is better guaranteed in traditional agricultural systems (although one could of course wonder whether this is also true for the production of, for example, foie gras).

The design of the 'Label Rouge' scheme, which hosts many locally produced traditional products, must be understood in this context. Label Rouge tries to provide a guarantee for high-quality food, produced in traditional ways. In another way, the AOC/PDO scheme (guaranteed origin) tries to achieve more or less the same: to guarantee local and artisan production of high-quality products. In these schemes, animal welfare is only addressed indirectly, and therefore it is hard to recognise 'real' animal welfare schemes in France.

The Italian situation is comparable to the French situation. The Italian people are also primarily concerned with food quality (taste), which is, as in France, seen as a result of the production system and, therefore, indirectly also partly a result of the treatment of

the animals. Animal welfare in itself is hardly an issue in Italy. There are many locally organised quality assurance schemes with alternating levels of animal welfare requirements. The PDO/PGI labels are in general very important, apart from the PDO pork production already mentioned, in dairy almost 50% of cheese is produced according to PDO product specification accounting for 27 PDO/PGI products from cow milk and 5 from ewe milk.

In Sweden and Norway, people are concerned with animal welfare, but they consider it possibly as a foreign problem. People in these countries appear relatively sure that 'animal welfare' matters are well organised in their country and taken care of by government and the responsible industries. To illustrate: after entry into the European Union, politicians in Sweden agreed to continue its leading position in animal welfare legislation, so apparently there is a widespread agreement in Sweden that Sweden in fact has a leading position. This may well be an explanation for the fact that schemes that explicitly aim for improved animal welfare are more or less absent in Sweden and, apart from some very small initiatives, also in Norway.

In Norway, yet another matter is of some importance. The Norwegian meat industry especially seems to hold a 'gentleman's agreement' that animal welfare is not an appropriate domain for company-specific differentiation in order to boost sales. Also other sectors, particularly dairy, have been organised in a likewise corporatist fashion. In effect, this has resulted, for instance, in a joint R&D unit for the meat industry, which monitors the animal welfare situation in Norway, and offers solutions to identified problems. The KSL scheme was also set up in this corporatist spirit, designed by central negotiations. Requirements regarding animal welfare constitute a significant part of the KSL system.

In the Netherlands animal welfare is the second most important concern of consumers (regarding food) after food safety. Some very active animal welfare action groups are operative in the Netherlands, and they have significant political and sometimes even economical influence. An example of their economical influence could be the fact that due to public actions of 'Wakker Dier' (an animal rights group), all major national supermarket chains have decided to stop the sales of battery eggs, and only sell free-range eggs since January 2004. However, a much heard of complaint of producers, food industry and even the government is that in contrast to the public concern about animal welfare, consumers are not willing to pay extra for animal friendlier production methods. Nevertheless, some small initiatives are running with alternating success. The major Dutch quality assurance schemes such as IKB (meat and eggs) and KKM (milk) mainly focus on food safety, and animal welfare only plays a minor role. These schemes are organised in a corporatist fashion, perhaps a comparable to the Norwegian KSL.

In the United Kingdom, the animal welfare action groups are possibly even more radical than in the Netherlands, and their influence proportionally significant. The largest of them is the RSPCA, and to provide the British consumer with an alternative, they initiated the development of the 'Freedom Food' scheme. In Britain there is an important distinction between city and countryside. Animal welfare is much more an issue in the cities than in the rural areas. Apart from animal welfare, British consumers are mainly concerned with food safety (e.g. 'Frankenstein Food'). They also seem to be

sensitive to campaigns and labels for local or national production (e.g. 'Buy British'). In 2000, many regional schemes and labels for beef, lamb, pork, poultry, eggs and dairy were combined in the British Farm Standard, which is an industry-led scheme with a complex organisational structure (because of the many sub-schemes with different organisation structures).

The pig sector

In the six countries, pig industry is relatively most important in France and the Netherlands, and to a lesser extent in the United Kingdom and Italy. In these countries the industrial setup of the sector is questioned heavily by politics and society. Other important, more detailed, welfare issues are: the non-anaesthetised castration of male piglets, long-distance transportation, tail docking, tooth clipping, individual housing of sows and the availability / absence of straw or other playing material. Moreover, some welfare measures have major implications for producers, such as: the maximum grid width of slatted floors, the requirement to provide pigs with water *ad libitum*, and the minimum levels for light intensity.

The poultry sector

The egg production and poultry sectors are of varying importance within the six countries. This is probably to do with the history of the sector as a side-activity on many farms. In many cases, egg and poultry production still has this position. In other cases, however, egg and poultry production have become a heavily specialised sector with thousands of animals per production unit. Hence, average farm sizes vary greatly, not only within each country, but also between the six participating countries. Whereas in the Netherlands or France egg production units with 30,000 laying hens or more are no exception, a large egg farm in Norway may exploit 5,000 chickens or so. Italy too is a country with great diversity: there are very large egg production farms, but there are also many small farms with less than 1,000 hens.

For poultry production it seems that especially France and Italy have large numbers of farms in this sector. In the Scandinavian countries, poultry production is of minor importance. The chicken branch is confronted with some unique welfare problems. Cage housing for laying hens is probably the most urgent problem. There is a widespread discussion going on about the assumed welfare improvement from the introduction of the so-called 'enhanced' or 'enriched' cage. Also beak trimming is a welfare problem which gives cause to much discussion. What is best for the welfare of chickens: not to trim the beaks with the risk of feather-pecking, or to trim the beaks and thus mutilating the chickens body? Some countries have decided to forbid beak trimming (Norway, Sweden) or to forbid it in the future (UK in 2010).

The most important welfare problem in the poultry sector is the 'growth rate' of the broilers. Sometimes they grow so fast that they cannot stand up any more, or break their legs and even die.

The cattle and veal sector

The cattle sector is the most important in all six participating countries. Especially dairy production is very important. In France, Italy and the UK beef production is also of great importance. Veal production is of minor importance. In Norway and Sweden it is virtually absent. In France and the Netherlands, and to a lesser extent in Italy, veal production is of some importance.

Dairy farming is generally perceived as an animal friendly way of production. This is probably the reason for the absence of specific welfare legislation for dairy cattle. Nevertheless, there are welfare problems and issues in this sector. For instance:

- The type of housing (cubicles, deep litter, or tethering). Especially the practice of tethering during winter-housing is being questioned.
- De-horning.
- The growing practice of zero grazing.
- The use of new 'biotechnological' innovations like embryo-transplanting, the use of hormones, genetic modification, cloning etc. Some of these practices are not legal (yet).

Additional requirements exist in organic dairy farming.

Beef production is very diverse in its performance. Some beef production takes place on very extensive farms, with animals that graze in semi-natural circumstances, whereas other beef production units are very intensively operated. The most important welfare issues in this sector are:

- The use of cattle breeds which, because of their heavy build, require caesarean section to be able to give birth.
- De-horning, castration of bulls and other invasive operations.

Veal production, finally, is probably best comparable with pig and egg production, regarding its general intensity. One of the first public animal welfare scandals concerned veal production: the infamous practice of 'box calves'. Nowadays, this practice is banned nearly completely. However, other welfare issues have emerged; the most important are:

- Individual housing. Veal farmers in the EU have to convert to group housing by 2007.
- Anaemia, due to a lack of iron in the fodder. This practice is carried out on purpose, to make veal whiter in colour. Some countries have restrictions based on a minimum level of haemoglobin in the blood.

Table 22.1 presents an overview of the number of farmers in each livestock sector in the six participating countries. There is no (white) veal production in Norway and Sweden.

TABLE 22.1 Numbers of farmers in six livestock production sectors in Norway, Sweden, France, the United Kingdom, the Netherlands, and Italy.

	Pig producers	Egg producers	Poultry producers	Dairy producers	Beef producers	Veal producers
N	4,126	800 ¹	536	18,000	6,000	-
S	3,669	672	5,422	9,720	7,800	-
F	16,000	2,500	14,000	100,000	100,000	10,000
UK	12,300	32,300	2,900	26,600	59,600	
NL	10,000	1,300	800	25,000	2,700	3,200
I	6,159 ²	6,324 ²	13,228 ²	64,758 ³	16,811	

Notes: ¹ Only farms of over 1,000 hens are included – these 800 farms produce about 90% of all Norwegian eggs, there are 3,100 Norwegian egg producers in total; ² only farms of over 50 animals are included; ³ only farms of over 2 animals are included.

CONCLUSIONS TO PART III

There is great variety in the ways animal welfare is organised in the participating countries, on the one hand, as there are many different small schemes that integrate animal welfare regulations in some way and to some extent. On the other hand, there is very little difference in legal regulations, which may be explained by the fact that there EU regulation is quite extensive by now. Moreover, the implementation of legal regulations seems to be organised in a very similar way. In order to understand the organisation of animal welfare within animal production, we distinguished three categories of ‘animal welfare schemes’: quality assurance schemes, specific animal welfare schemes and organic production schemes. Within the category of quality assurance schemes it is relevant to distinguish two types of schemes: basic quality assurance schemes and top-quality assurance schemes.

All participating countries have a basic Quality Assurance Scheme focusing primarily on food safety and food quality but integrating national legal regulations on animal welfare. These quality assurance schemes serve to implement legal regulations at the level of the farm and to assist farmers in keeping up with legal requirements. National quality assurance schemes may be set up by the agricultural sector itself, by the government or through cooperation between private and public stakeholders. Generally, quality assurance schemes include all animal sectors.

Participation in these basic schemes is ‘voluntary’ but non-participation practically results in limited market access. Premium prices are generally not paid.

In future, we might see further cooperation between national quality assurance schemes. Dutch farmers have applied already for certification by German quality assurance schemes in order to get access to the German market. To facilitate this process, the Dutch quality assurance schemes (IKB) have agreed with the German quality assurance schemes to acknowledge each others certification. In the longer run national quality assurance schemes might very well become integrated into EUREPGAP regulations.

Some countries – for instance, France, Italy and to some extent the Netherlands – carry top-quality assurance schemes alongside basic quality assurance schemes, which focus on high-quality production. These schemes include animal welfare regulations which go well beyond legal regulations. They suppose that high-quality production presupposes animal welfare. The schemes are generally initiated by private bodies, although some of them refer to governmental and even EU regulations, such as AOC and DOC schemes. Participation is voluntary and rewarded by the payment of premium prices.

Judging from the growing interest for high-quality food and locally produced food among consumers, it may be expected that these schemes will increase in numbers. Many of them will incorporate small groups of farmers, linked to specific products and a specific territory.

All countries have specific animal welfare schemes alongside basic and/or top-quality assurance schemes, which go well beyond the legal regulation of animal welfare, focusing specifically on animal well-being (quality of products might be considered but not as primary aim). Some of the schemes – for instance, in the UK, the Netherlands and Italy – are founded by animal protection NGOs, and are organised at the national level. But many of these specific animal welfare schemes are regionally operative, sometimes (as in the case of Italy) focusing on specific animal breeds.

Participation in these schemes is voluntary and is rewarded by payment of premium prices. Generally, participation rates are low and well below 10% of producers.

Third, all countries have organic production schemes that include animal welfare as one of the ethical principles of organic production, also referring to the health of organic products. Their regulations are well beyond the national legal regulations.

Participation is voluntary and rewarded by the (generally) higher prices of organic products.

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APPENDIX

French statistics

TABLE A1 Statistics of wholesale last 10 years.

	Milk***	Beef*	Pork*	Eggs**	Poultres*
91	78.5	30	33	850	20.86
95		28.1	35.75	950	23.72
99		27.7	37	960	24.8
2000	73	26.4	38	950	26.16
2001		25.7	36	950	25.9
2002	71	27.8	37.1	940	26.4
Tendance	↘	↘↗	↗↘↗	→	↗

Notes: * Individual consumption (kg/hd/yr); ** Unite: 1000 TECOQ; *** kg/hab/year.

TABLE A2 Meat consumption in France (in 2003).

Order	Type of meat	Consumption (1,000 tons)
1	pork	2254
2	beef and veal	1663
3	poultry	1430
4	ovine and caprine meat	264
5	other	27

Sources: OFIVAL d'après FAO, Eurostat, Scees.

Italian statistics

TABLE A3 Statistics of wholesales (1994–2003, consumption kg/hd).

Year	Pork meat	Poultry	Milk	Processed meat	Eggs	Eggs (kg)
1994	27.3	18.8	74.4	-		
1995	27.4	18.8	76.8	-	219	13.7
1996	28.1	19.3	76.8	-	221	13.9
1997	28.4	19.5	-	-	222	14
1998	28.5	19.3	-	-	222	14
1999	28.9	19	65.9	-	224	14.1
2000	30.1	18.5	64.5	-	219	13.8
2001	30.1	20.6	-	-	227	14.3
2002	-	19.1	-	-	223	14
2003	-	18.7	-	-	218	13.8
	Source: ISTAT and UNA	Source: ISTAT	Source: ISMEA		Source: UNA	Source: UNA

UK statistics

Table A4 UK consumption of hen eggs (shell eggs and processed eggs).

	Production million dozen	Per capita consumption (eggs/year)
1980–1982	1,066	227.0
...		
1987	900	189.7
1988	891	187.4
1989	789	165.6
1990	867	181.5
1991	853	178.2
1992	831	173.3
1993	810	168.5
1994	837	173.3
1995	818	168.9
1996	833	171.6
1997	838	173.2
1998	819	168.7
1999	795	162.3
2000	822	167.9
2001	912	185.2
2002	982	199.4
2003	1015	205.0

Note: 2003 figure provisional.

Source: 'Agriculture in the United Kingdom' DEFRA/MAFF.

TABLE A5 Meat consumption in the UK (1980–2004).

	1980–84	1980	1985	1990	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Beef and veal															
														Prov	F'cast
Tot. consumption ('000 tonnes)		1200	1132	983	968	901	740	842	874	914	940	922	987	1010	1019
Per capita consumption (kg/yr)	19.1		19.0	17.2	16.7	15.5	12.7	14.5	15.0	15.6	16.0	15.6	16.7	17.0	17.1
Pork															
Tot. consumption ('000 tonnes)		707	699	757	740	691	721	744	751	774	740	743	772	823	816
Per capita consumption (kg/yr)	12.9		12.7	13.0	12.0	11.0	11.3	11.8	11.9	12.3	11.7	11.5	11.9	12.1	11.9
Bacon															
Tot. consumption ('000 tonnes)		507	462	445	457	470	474	465	479	476	476	477	477	485	484
Per capita consumption (kg/yr)	8.6		8.1	7.8	7.9	8.1	8.2	8	8.2	8.1	8.1	8.1	8.1	8.2	8.1
Mutton & Lamb															
Tot. consumption ('000 tonnes)		433	411	429	353	351	366	352	373	380	390	335	353	350	353
Per capita consumption (kg/yr)	7.1		7.1	7.5	6.1	6.1	6.3	6.0	6.4	6.5	6.6	5.7	6.0	5.9	5.9
Poultry															
Tot. consumption ('000 tonnes)		716	885	1217	1458	1498	1582	1561	1648	1720	1707	1716	1698	1711	1722
Per capita consumption (kg/yr)	14.2		15.6	21.3	25.2	25.8	27.2	26.8	28.2	29.3	29.0	29.1	28.7	28.8	28.9

Source: 'A pocketful of meat facts', Economics Division, Meat and Livestock Commission.

The Netherlands

Table A6 Dutch consumption of animal products (consumption per capita).

	1990	1995	1999	2000	2001	2002
Milk and milk products (kg)	162	157	153	152	146	147
Meat (kg)	40	44	44	43	43	42
Eggs (no.)	176	175	180	180	181	184

TABLE A7 Dutch consumption of different sorts of meat.

	1990	1995	1999	2000	2001
Pork (kg)	9.7	10.2	9.8	9.6	9.5
Beef (kg)	22.5	22.1	21.8	21.8	21.2
Chicken (kg)	8.6	10.2	10.7	10.8	11

TABLE A8 Market share of different eggs in the Netherlands (%)

	1995	1999
Battery eggs	57	54
Free-range eggs*	40	44
Voliere eggs	3	2
Total	100	100

Note: *including eggs of organically held hens and eggs of free-range hens which have the possibility to go outside.

Sweden

TABLE A9 Consumption of meat (all), beef, pork, poultry, and eggs in Sweden 1994 - 2002, kg/hd (milk: ltr/hd).

	1994	1995*	1996	1997	1998	1999	2000	2001	2002
All Meat	29.8	31.3	32.4	34.8	36.6	38.0	41.3	40.7	42.4
Beef	6.8	7.1	8.2	9.0	9.0	9.5	10.8	9.9	11.0
Pork	12.0	12.9	13.3	14.7	15.7	15.2	15.5	14.6	14.4
Poultry	7.7	8.2	8.1	8.4	8.9	10.2	11.8	12.8	13.8
Eggs	10.8	10.4	10.9	10.7	11.0	11.1	10.4	9.9	9.1
Milk	146.0	144.7	144.3	143.9	142.0	140.8	138.7	139.5	141.5

Notes: * Changes in the measuring methods for beef, pork and poultry in 1995 make comparisons between the period 1994–1995 and 1996–2002 unreliable; ** unreliable figures, according to the source; *** including yoghurt, etc.

Source: Jordbruksstatistisk årsbok.

Norway

TABLE A10 Statistics of wholesales per person in Norway (in kg and ltr).

	1959	1969	1979	1989	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Milk**	187.7	188.9	186.3	174.0	160.2	156.0	151.3	145.7	140.0	132.3	127.5	122.5	120.8	118.0
Beef***	13.6	14.5	19.5	17.4	20.0	19.9	20.2	19.7	20.3	20.2	20.5	20.0	19.7	20.0
Pork	14.2	17.4	21.2	19.5	22.4	23.4	24.2	24.0	24.0	23.0	23.4	24.6	23.4	24.1
Eggs	8.4	9.9	10.8	11.5	10.9	10.6	10.7	10.7	10.5	10.3	10.3	10.3	10.3	10.8
Poultry	.7	1.4	2.7	4.6	6.2	6.5	7.0	7.4	7.7	8.4	8.8	9.9	10.2	11.0
Fish****	-	-	-	-	-	33.5	35.7	35.7	35.9	37.6	37.9	39.3	-	-
Mutton/lamb	4.3	4.8	5.5	5.9	5.6	6.1	5.2	5.6	5.5	5.3	5.4	5.1	5.6	5.5
Processed meat*****	-	-	-	22.9	-	-	-	25.3	26.5	27.3	26.7	-	-	-

Notes: * 2003 figures are preliminary estimates from NILF; ** Includes all liquid milk products used directly by consumers; *** Including veal; **** Figures converted into whole unclean fish per person; ***** Based on sales figures, including only minced meat, meat balls, sausages and cold cuts (excluding frozen and canned meat products).

Source: Statistics collected by Directorate for Health and Social Affairs, 2003, and unpublished statistics from the National Institute of Agricultural Economic Research (NILF).



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Project Office Welfare Quality
Animal Sciences Group of Wageningen UR
Edelhertweg 15
P.O Box 65
NL - 8200 AB Lelystad
The Netherlands
Phone +31 320 293503
Fax +31 320 238050
e-mail: info@welfarequality.net
Internet: www.welfarequality.net

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