

Consumer Concerns about Animal Welfare and the Impact on Food Choice¹

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PROCEEDINGS of the DISSEMINATION SEMINAR

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Introduction

This report presents the findings of the dissemination seminar held in Brussels on 12th September 2001. The seminar was attended by distinguished guests: Chairman, Mr John Bruton; Keynote Speaker, Dr David Wilkins; expert panel members and a range of food industry and animal welfare organisations' representatives. This report provides details of the four academic papers, which were presented, and the discussions that followed. The project team are indebted to all the contributors who made the event a success.

Project Rationale

The project, Consumer Concerns about Animal Welfare and the Impact on Food Choice, is 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', for example free-range eggs (Intel, 1996; MAPS, 1996; Volbeh, 1990; Sorensen, 1995), the growth in the number of vegetarians (Intel, 1994; Intel, 1996; Federation Naturista Vegetariana, 1996; EMNID, 1989) and calls for tougher regulation of welfare in animal production (Bennett, 1996; Oliver *et al.*, 1996; Harrison, 1992; Birbeck, 1991; Baumgartner, 1993; 1994; Rohte, 1993; Rojahn, 1993). There have also been a number of consumer surveys which claim to support the proposition that consumers are becoming more concerned about animal welfare in food production (see for example MLC, 1996; Diestre, 1993; von Albensleben, 1988; 1989; 1994; 1996; Fiddes, 1991; Birbeck, 1991; Webster, 1995a; 1995b). 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. In turn, consumer concerns about animal welfare have important implications for producers and retailers of animal-based food products within the EU.

Although there is a burgeoning literature on the problems of measuring animal welfare from a scientific and philosophical perspective (see for example Beckoff, 1994; Mason and Mendl, 1993; Broome, 1991; Dawkins, 1990; Comstock, 1994; Straughan, 1996; Sperlinger, 1981; Waran, 1995), there are remarkably few published studies of consumer understanding and concerns about animal welfare (Carruthers, 1991). Those studies which do exist only address consumer concerns about animal welfare in one or two countries and generally report the results of relatively simple consumer surveys (for example Rogers *et al.*, 1989; Eurogroup for Animal Welfare, 1996; RSPCA, 1996; Intel, 1994; Appleby, 1993; Bennett, 1996; von Loeper, *et al.*, 1985; Volbeh, 1990; Walter and Reisner, 1994; Gerken, 1994; Sorensen, 1995; Kuehnle and Muehlbauer, 1992; Rasmusen, 1978; Phenson and Sigurdanson, 1992). For example, such studies typically pose the question "Are you concerned about the welfare of animals produced for human consumption?" without any attempt to understand what consumers actually mean by animal welfare. There has, however, been a more significant quantity of research on the nature of consumer concerns towards the welfare of animals kept as pets (for example Paul and Serpell, 1993; Bowd, 1984; Herzog *et al.*, 1991) and used for experimentation (for example Paul, 1995; Furnham and Hayes, 1993; Driscoll, 1982; Bowd and Boylan,

1986), and the attitudes of animal welfare activists (Galvin and Herzog, 1992; Bowd and Bowd, 1989; Plous, 1991) which provide a valuable guide for the design of the methodology applied in the current proposal.

In part, the paucity of research specifically on consumer concerns about animal welfare is bridged by the results of more general studies, which allude to animal welfare. Examples include studies of the perceived quality of animal-based food products (for example Grunert, 1996; MLC, 1996; Diestre, 1993; Arnau *et al.*, 1990; Brunso *et al.*, 1996; Troeger, 1996; Branschneid, 1993; Kallweit, 1994; Holm and Drake, 1989; Henson and Northen, 1996), vegetarianism (Richardson *et al.*, 1993; Woodward, 1988; Beardsworth and Kiel, 1992; Henson *et al.*, 1996; Dietz *et al.*, 1995; Realeat, 1996) and consumer concerns about the environment and genetic engineering (CEC, 1992; Hamstra, 1991; Ellahi, 1994; Hansen and Sorensen, 1993; Lohner, 1994; Pfeiffer *et al.*, 1992; Sparks *et al.*, 1995).

Consumer concerns about animal welfare have important implications for the future of the animal-based food products industry within the EU (Hughes, 1996; Whitemore, 1995; Hilse, 1993a; 1993b; Waran, 1995; MLC, 1993; Ekesbo, 1994; Berry, 1993). Firstly, as has already been experienced in some member states, the total demand for animal-based food products is sensitive to concerns about animal welfare (McInerney, 1991; Bennett, 1994; 1995; 1996). Secondly, such concerns may challenge the acceptability of established methods of animal production and transportation (Whitemore, 1995). This issue has gained in prominence as a result of the recent BSE scare (Intel, 1996; von Albenleben, 1996) and concerns about biotechnology (Raichan *et al.*, 1993 Hamstra, 1993; Lex, 1995; Ellahi, 1994).

Despite the importance of consumer concerns about animal welfare for the future of the animal-based food products industry, existing research provides little information on the specific nature of consumer concerns about animal welfare, in particular how such concerns relate to the actual practices used to rear and transport animals, how concerns differ both quantitatively and qualitatively between EU member states, and the potential influence of concerns about animal welfare on the choice of animal-based food products.

Aims of the Project

The overall objectives of the project are to assess the nature and magnitude of consumer concerns about animal welfare within a cross-section of EU member states United Kingdom, Ireland, Germany, France and Italy; to assess the impact on choice of animal-based food products; and to suggest strategies by which consumer concerns can be addressed.

The specific aims of the project are to:

- identify the nature of consumer concerns about animal welfare within a cross-section of EU member states;

- assess the differences and similarities in consumer concerns about animal welfare, between consumers both within and across EU member states;
- identify the relationship between consumer concerns about animal welfare and the methods used to rear animals;
- assess the knowledge of consumers about the actual practices employed to rear animals;
- assess the trade-off between animal welfare, price and other product characteristics in choice of animal-based food products;
- assess the impact of changes in the methods used to rear animals and the potential choice of animal-based food products; and
- find potential strategies through which policymakers, producers of animal-based food products and retailers can address consumer concerns about the welfare of animals produced for human consumption.

Aims of the Dissemination Seminar

The aims of the dissemination seminar are to:

- share and discuss the results of the project with representatives of the food industry, farmers, consumers' organisations and animal welfare organisations; and
- receive feedback on the results to incorporate into the final report, focusing on strategies to address consumer concern about animal welfare and the impact on food choice.

Format of the Dissemination Seminar

The dissemination seminar included an introduction by Dr David Wilkins, Director of Eurogroup for Animal Welfare, on the importance of animal welfare, four presentations by project team members and panel discussions with panel members: Risto Volenan (Secretary General of COPA), Andrea Gavinelli (European Commission), Peter Vingerling (Dutch Society for the Protection of Animals) and Fintan Grimes (Consultant to Bord Bia). John Bruton chaired the seminar. Details of the speakers follow.

John Bruton is the former Prime Minister of the Republic of Ireland. He is vice-president of the European People's Party and chairman of the European People's Party Ad-Hoc

Working Group, entitled the *Future of Agriculture, Food Quality and Rural Life*. Mr Bruton is a former spokesman on Agriculture for his Party and has been a farmer in the livestock sector. He believes that high standards of animal welfare are consistent with the development of a dynamic commercially competitive and effective system of agricultural production satisfying the needs both of farmers and consumers.

David Wilkins is the Director of Eurogroup for Animal Welfare and a Member of the Order of the British Empire (MBE). He graduated from Cambridge University School of Veterinary Medicine and is a member of the Royal College of Veterinary Surgeons. Dr Wilkins is an adviser to the RSPCA on European matters and to the European Parliament's Intergroup on the Welfare and Conservation of Animals. He is also an expert to the Council of Europe's Standing Committee on the Convention on the Protection of Animals kept for Farming Purposes and to the Economic and Social Committee of the European Communities on various animal welfare matters. Dr Wilkins is also a member of the European Commission's (DGVI) Advisory Committee on Common Agriculture Policy (CAP) and Sub-Committee on Farm Animal Welfare.

Andrea Gavinelli is a veterinary graduate of the University of Milan. His thesis investigated the behaviour of calves kept in crates. He is an animal welfare expert in the Italian Ministry of Health as well as a member of the Bureau of the Standing Committee of the European Convention for the Protection of Animals kept for Farming Purposes. Andrea Gavinelli is currently an administrator at the European Commission Directorate General for Health and Consumer Protection in the field of animal welfare legislation.

Fintan Grimes is a Poultry Consultant to Bord Bia, the Irish Food Board. He is a graduate of Harper Adams Agricultural College in business and marketing. Mr Grimes has worked in poultry processing and integration for a major Irish company, as well as in poultry equipment and ventilation. Mr Grimes is an expert in poultry and egg production and currently operates Bord Bia's egg and poultry meat quality assurance schemes.

Peter Vingerling heads the scientific and policy centre of the Dutch Society for the Protection of Animals. He is responsible for the organisation's overall campaign and policy strategy concerning the restructuring of agribusiness. This includes strategy development on the Common Agriculture Policy (CAP), and analysing the respective approaches of consumers, retailers, and slaughterhouses and farmers' unions to animal welfare in The Netherlands. Mr Vingerling is responsible for the implementation of animal welfare plans in Europe and is a member of the executive committee of Eurogroup for Animal Welfare.

Risto Volanen is the Secretary General of the Comité des Organisations Professionnelles Agricoles de l'Union Européenne and the Comité Général de la Coopération Agricole de l'Union Européenne (COPA-COGECA). COPA is the European farmers' organisation representing the national farmers unions of 15 EU member countries and their six and half million farmers. COGECA is the European organisation of national co-operative

organisations and represents their 30 000 agriculture co-operatives. COPA and COGECA have their common Secretariat in Brussels representing the interests of EU agriculture sector. Risto Volanen is Doctor of Social Sciences, Associate Professor in the University of Tampere, Finland. Before coming to Brussels four years ago he worked in Finland in the ministry of finance and then in the Finnish farmer co-operative association.

Gemma Harper is a consumer psychologist in the Department of Agricultural and Food Economics, The University of Reading. Dr Harper, with Dr Spencer Henson, co-ordinates this EU-funded project on Consumer Concerns about Animal Welfare and the Impact on Food Choice. Her main research focuses on the psychology of consumer behaviour and food marketing. She has conducted research for the UK Government (including DfID and DEFRA), the EU and FAO. Recent work includes the impact of introducing animal welfare standards for developing countries, an economic evaluation of farm animal welfare policy, an economic evaluation of policy on food-borne pathogens in live animals, consumer attitudes to genetically modified food and functional food, and livestock production and marketing in the Caribbean.

Mara Miele is a lecturer in the Department of Agricultural Economics at the University of Pisa. She has conducted research on organic farming in Italy (1991-1992), in the United States (1998), in Germany and The Netherlands (1996-1998) and will continue research in the coming 3 years with a new EU-funded research project 'Overcoming barriers to conversion to organic farming through market mechanisms'. Mara Miele's main research interests are consumer behaviour and commercialisation of organic and 'animal friendly' products. During the last five years, she has been involved in several research projects that focused on consumer behaviour and sales promotion on a regional scale within the European context.

Hilary Meehan is a research officer in The National Food Centre, Ireland. She holds a masters degree in agribusiness and food marketing from University College, Dublin. Her research focuses on consumer behaviour and food marketing, including consumer concerns about animal welfare, conversion to organic farming, and the market for speciality food, and novel cheeses. She has worked as a consultant to Bord Glas and a number of small Irish dairy companies.

The Nature and Level of Consumer Concern about Animal Welfare

Gemma Harper, The University of Reading, UK

It may be obvious that consumer concern about animal welfare involves the animals themselves but consumer concern about animal welfare is not only about animals. It is also significantly about human welfare. However, my presentation will focus on the nature and level of consumer concern about the welfare of farm animals. I shall provide the background to the project in terms of previous evidence for consumer concern about animal welfare and the areas of investigation undertaken by the project team. I shall briefly review the methods we used to investigate consumer concern and focus on those animal-centred, or zoocentric, concerns, which emerged from the data, before concluding on this section of the project results.

This project emerged in response to evidence of increasing consumer concern about farm animal welfare. Such evidence comes from the overall changing patterns of meat consumption, including the shift from red to white meat, and the emerging markets for so-called 'animal-friendly' food products. Together with the increasing regulation of farm animal welfare standards, at the European level, and the debate over global competitiveness and the role of animal welfare standards as barriers to trade, these issues propelled the European Union to fund this three year project to investigate the nature and extent of consumer concern about farm animal welfare and the impact on food choice.

The project involves eight partners. It is co-ordinated by The University of Reading, in the UK, and has four other academic partners including the National Food Centre in Ireland, the University of Pisa in Italy, the Institut National de la Recherche Agronomique (INRA) in France and the University of Kiel in Germany. The academic researchers are assisted, at each stage of the project, by two industrial partners, the Meat and Livestock Commission in the UK and Bord Bia (the food board) in Ireland; and also by Eurogroup for Animal Welfare in Brussels, an animal welfare organisation, which includes the main animal welfare organisation in each EU Member State as its members. The study countries are the UK, Ireland, France, Italy and Germany.

The project aims to investigate the nature of consumer concerns about animal welfare; the relationship between consumer concerns and methods of animal production; and acceptability of animal production practices. In order to investigate these areas, the project incorporates a range of methods, which begin qualitatively and become increasingly quantitative. In each case, research is conducted in each of the study countries and, subsequently, the results are compared for comparative reports by the Co-ordinator. The project began, three years ago, with literature reviews in each country, which found that, although there was quantitative evidence for high levels of consumer concern about farm animal welfare, there was far less research into consumer definitions and meanings of animals welfare and the impact of concern on actual behaviour. Furthermore, there was no cross-cultural research, such as this, previously undertaken. The literature review guided the development of the focus groups. Four (plus one pilot)

groups were conducted in each country to explore the nature of consumer concerns, their priorities, definitions and meanings, in relation to concern about animal welfare. The results of the focus groups were used to design the in-depth interviews (60 in each country), which identified the key values which motivate concern about animal welfare. The qualitative results were used to generate hypotheses to be tested using a representative sample survey (500 in each country). The Meat and Livestock Commission, Bord Bia and Eurogroup for Animal Welfare prepared an Assessment Report of the project findings. The qualitative and quantitative results were presented to policy-makers, representatives of the food industry and animal welfare organisations at a workshop in Brussels earlier this year. The results of the workshop were used to devise strategies to address consumer concern about farm animal welfare. A series of four focus groups (plus one pilot) were conducted in each of the study countries to discuss the proposed strategies. The Assessment Report, the Strategies Workshop and the Strategies Focus Groups form the overall assessment stage of the project. The project culminates with this dissemination seminar and the final report.

In this presentation, I am focusing on the nature of animal-centred consumer concerns, the meanings of animal welfare, and the level of animal-centred consumer concern, consumer acceptability of production methods and the perceived determinants of farm animal welfare.

Consumer concern about farm animal welfare bifurcates between concern about the actual animals, animal-centred or zoocentric concerns, and concern about the consumers themselves, human-centred or anthropocentric concerns. Anthropocentric concerns focus on the impact of animal welfare standards on food safety and quality, whilst zoocentric concerns focus on the impact of animal welfare standards on animal health and animal suffering. While consumer concern about animal welfare is characterised by two distinct types of concern, the relationship between the anthropocentric and zoocentric concern is reciprocal – one type is an indicator of the other and rarely are they separated in the consumer's mind. One of the first key results from the qualitative research was that consumers, although concerned about animals, use animal welfare as an indicator of other, usually more important, product characteristics, such as food safety and quality.

Nonetheless, consumers were concerned about the welfare of farm animals. The degree to which they prioritised this concern was evident in the difference between spontaneous versus prompted concern in the focus groups. When consumers were asked what food issues concerned them, there was a very low, if not absent, concern for animal welfare. However, when consumers were asked specifically about animal welfare they expressed, as expected, very high levels of concern, particularly about battery cages and veal crate production methods. It is well known that being concerned about animal welfare is a sign of our humanity, so one would not expect consumers to say, when asked, that they were not concerned. Rather, high levels of reported concern would be expected since to be concerned is socially desirable. However, the dramatic difference between spontaneous and prompted concerns informs us not just that consumers are concerned, a less interesting fact, but, rather, that they do not prioritise that concern when thinking about

food. This, in turn, gives us insight as to why very high levels of reported concern about animal welfare are not translated into actual food choice behaviour, an issue to be presented later today.

Throughout the study countries, with some variance, consumers stated that they were particularly concerned about battery cages and veal crates. These two production systems provide apt examples of the zoocentric and anthropocentric strands of concern. In the case of battery cages, concern is founded on the incidence of salmonella and the introduction of television images of battery cage systems into the consumers' living room, for the first time, in light of this food safety issue. In the case of veal crates, animal welfare organisations have campaigned extensively against this production method, and a combination of the removal of the calf from the mother, restraint of the animal and inadequate feeding contribute to consumers' concern about this production method.

The qualitative research revealed clearly that consumers use animal welfare as an indicator of other product attributes. This was confirmed in the survey where there was agreement with the relation between animal welfare, food quality, food safety and the healthiness of food. As expected, when asked about zoocentric concerns, consumers rated their concern highly (between 4, somewhat agree, and 5, strongly agree), however, of more interest was the rating of anthropocentric concern (from 3, neither agree nor disagree, to 4, somewhat agree). The quantitative results supported the notion that consumer concern about animal welfare is a multi-dimensional concept.

Meanings of animal welfare are often presumed to be one-dimensional and to refer to the welfare of animals. We have already seen that it is a multidimensional concept. Furthermore, little is understood of what consumers are actually talking about when they refer to animal-centred concerns about animal welfare. Two key concepts emerged from our research: 'natural' and 'humane'. These concepts are axiomatic to consumers, that is to say, they are self-evident truths, requiring no further explanation. Being 'natural' is the most ubiquitous concept and is applied to animal feed, rearing conditions, reproduction and behaviour. Being natural is perceived to be better for the animal, and also has positive consequences in terms of the impact on food safety and quality. Consumers believe that good animal welfare standards are those which are as close as possible to nature. Natural conditions to consumers are inherently good. The more natural the conditions, the better quality of life the animal will have. Issues of animal health complicate this belief, however, there is a general acceptance that good animal welfare is equated with natural conditions.

The question as to what natural actually means in practice is the point at which this concept is characterised as axiomatic. Consumers do not necessarily know what more natural conditions mean in term of species behaviour and requirement. They are, after all, not animal behaviourists themselves. However, natural conditions do have some indicators such as space, access to outside and natural light sources, and feed that is as close as possible, if not actually, the food that the animals would eat if left to their own devices. Sometimes, but not always, natural conditions are framed in terms of

evolutionary explanations, i.e. an animal should be reared, reproduced, fed and allowed to behave in ways which closely resemble the way in which the animal has evolved. Animal feed featured strongly due to concern about BSE. One of the areas where natural rearing, including natural feed, was important for consumers was their perception that food safety disasters, like BSE, occur when the natural order is disrupted or, indeed, corrupted. This was perceived to be the case when naturally herbivorous animals, such as cattle, are fed animal-derived feed. Consumers perceive this to be an example of forcing cows to cannibalise, a perception which is based on something that is itself perceived to be unnatural and, therefore, unsafe.

Concerns about animal welfare focused on three primary areas: production methods, transport and slaughter. For each of these areas, the idea that the animals should not be treated 'cruelly' and should be treated 'humanely' dominated the discussions. Humane treatment has an inherently ethical meaning, it establishes the ethical parameters of an explicitly challenging issue. In this case, producing animals for food is counterintuitive to a number of people who class themselves as 'animal lovers', and who have day to day contact with domestic animals in the form of their pets. The humane position is an implicit welfare position. Animals can be justifiably bred, contained, treated, and slaughtered to serve humans as food – a point made in all the countries. 'Humane' crosses those anthropomorphic boundaries. Treating someone or some animal humanely rests on the notion that they are actually being treated badly. Farm animals must be treated humanely because ultimately they are perceived to suffer not only the constraints of production, but also the loss of their life. Being humane assuages consumer fears that they are responsible for the animal's suffering.

Starting from a position which states that humans are justified in rearing and killing animals for food requires a simultaneous defence of that position. That defence centres on the concept of 'humane'. But being humane is not enough. For those consumers with pets, and for others who entertain the thought that these animals may suffer, indeed they often state that the ultimate consequence of their consumption is the death of animals, then being 'humane' is inadequate. What is required is a psychological and behavioural strategy to ensure that the position that animals be justifiably reared, killed and eaten remains unblemished as an axiom, and non-threatening to their lifestyle. What is required is the active disassociation of the final product from the original animal.

The physical, linguistic and ideological estrangement of the product (meat) from the animal of origin was a particularly salient theme. Consumers were keen to alienate the product from its origin in order to allow them guilt-free consumption. A number of participants stated that if they 'thought about it' they would not be able to eat the products. Indeed, the idea that meat was a literal transformation of a living animal into a consumable object was actively repressed. Not having to think about the origins of the product meant that food was just food - necessary, nutritious and delicious. It meant maximum choice, minimum effort and price. In essence, it meant a clear conscience.

In terms of acceptability of production methods, the survey revealed that the UK and Italy were the only two countries to rate pork on the ‘somewhat acceptable’ side of the scale. Ireland, Germany and France find pork production ‘somewhat unacceptable’. Poultry production is rated ‘somewhat unacceptable’ by all the countries beginning with Italy, then UK, Germany, Ireland and France. Beef production is rated ‘somewhat acceptable’ by the UK and Ireland, but rated ‘somewhat unacceptable’ by Italy, France and Germany. Lamb production is considered ‘somewhat acceptable’ by Ireland, UK, Italy and Germany, but ‘somewhat unacceptable’ by France. Veal production is considered the least acceptable of all products, with the Italians, the Germans, the French and the Irish rating it ‘somewhat unacceptable’ and the British rating it ‘very unacceptable’. Egg production is only considered ‘somewhat acceptable’ by the Italians; the British, Irish, French and Germans all find it ‘somewhat unacceptable’. Milk production received amore variable rating with the French scoring it ‘somewhat unacceptable’, while the Italians, the Germans and the British rated it ‘somewhat acceptable’ and the Irish rated it ‘very acceptable’.

The most acceptable (1 = very unacceptable, 5 = very acceptable) method of production is for milk (mean score across countries = 3.37) and lamb (mean score across countries = 3.21), which are both rated in the ‘somewhat acceptable’ category. They are followed by pork (mean score across countries = 2.88), beef (mean score across countries = 2.81), eggs (mean score across countries = 2.58), veal (mean score across countries = 2.41) and poultry (mean score across countries = 2.40), all of which are rated ‘somewhat unacceptable’.

The overall mean score (1 = very unacceptable, 5 = very acceptable) for each country for acceptability of conventional production methods is between the ‘somewhat unacceptable’ and ‘neither acceptable nor unacceptable’ category, with France (mean score across all production methods = 2.38) rating the production methods least acceptable, followed by Germany (mean score across all production methods = 2.66), Italy (mean score across all production methods = 2.95), UK (mean score across all production methods = 2.90) and Ireland (mean score across all production methods = 2.99).

In terms of the importance of elements of production systems, identified in the qualitative research, for farm animal welfare, the survey revealed that each attribute is rated ‘very important’ to the welfare of animals produced for food (1 = very unimportant, 5 = very important). Space is rated most important by Ireland (4.76), followed by Germany (4.71), France (4.70), Italy (4.67) and UK (4.66). Quality of the animal’s feed is rated the most important attribute; firstly by Ireland (4.88), then France (4.85), UK (4.84), Germany (4.84) and Italy (4.81). Access to the outside is rated most important by Ireland (4.77), followed by Germany (4.74), Italy (4.73), France (4.70), and UK (4.61). Transport conditions are rated most important by Germany (4.74), then UK (4.71), Ireland (4.71), France (4.62) and Italy (4.46). Slaughter conditions are rated most important by Ireland (4.71), followed by UK (4.62), France (4.52), Germany (4.49) and Italy (4.41). Freedom

to behave normally is rated highest by Ireland (4.73), then UK (4.68), Italy (4.66), Germany (4.63) and France (4.54).

The most important attribute is animal feed (mean score across all countries = 4.84), followed by space (mean score across all countries = 4.70), outside access (mean score across all countries = 4.69), jointly transport and behaviour (mean score across all countries = 4.65) and finally slaughter (mean score across all countries = 4.55).

From both the qualitative and the quantitative evidence, we can conclude that concern about animal welfare is multi-dimensional. Zoocentric concern is relatively low priority compared to anthropocentric concern. Axiomatic concepts of 'natural' and 'humane' frame the meanings of animal welfare. The nature and level of concern about animal welfare is similar across the five study countries. Consumers rate milk and lamb production the most acceptable, while pork, beef, eggs, veal and finally poultry are all rated unacceptable. Each of the attributes of animal welfare were rated important, beginning with animal feed, followed by space, outdoor access, transport and normal behaviour and finally slaughter conditions. Although consumers report a high level of concern, such concern is not typically translated into behaviour. Despite the protests of consumers, the majority of animal-based food consumed in the EU is produced under intensive systems of production.

Consumer Concern about the Impact of Animal Welfare Standards on Food Safety and Quality

Mara Miele, University of Pisa, Italy

When consumers think of food production, there is more concern about production impacts on food safety, quality, human health and price than animal welfare. However, it is very hard to separate these issues and identify all the individual concerns in the consumer's mind. Indeed, consumers use animal welfare as an indicator of food quality, healthiness, safety and cost of the product. The implicit assumption of the vast majority of consumers we interviewed is that higher animal welfare equals better food quality, higher cost and improved health. So the results of the focus group discussion with consumers is that it was clear that human desire for health supersedes concern about animal welfare. Where animal welfare is expressed as a concern, it is a justification for high level of animal welfare, based on other concerns about other product characteristics. What also emerged clearly was that all countries, and especially Italy, demonstrated lack of knowledge regarding the specific production systems. It was quite astonishing, among consumers especially, because we selected consumers who were concerned about animal welfare and we assumed that this concern emerged from some type of knowledge about what was going on in animal production. The lack of knowledge is consistently one of the main problems in order to discuss animal welfare with consumers. We had consumers discussing what they mean by animal welfare and how animal welfare is related to other issues. Also, we investigated consumer opinions about what they would prefer as a system of production, and why systems of production seem to be superior or better for animal welfare for other animals. When we ran at first a series of focus groups with consumers, in which we selected consumers in terms of age, social class and gender, this issue about lack of knowledge was quite consistent and common, but was much more evident among consumers of lower social class. The need for more information was evident among all classes and among both genders.

Often animal welfare is explicitly traded against the issues of cost, convenience and healthy eating. Willingness to pay is obviously affected by this. This discussion about willingness to pay in some countries, more markedly in UK and to some extent in France as well, is a discussion that took place in a kind of a vacuum. In some cases, the only example of explicitly labelled animal-friendly products were organic products, which in Italy are available in only in some regions during the last few years. Three years ago, when we first started this project, the availability of these products was really minimal so these discussions took place in a vacuum in which there was no experience of the products and no understanding of what could have been a fair price. This issue of prioritising factors and using animal welfare as an indicator of better quality, higher safety standard and a greater contribution to human health emerged in this vacuum. It is hard to distinguish whether interest was purely in quality, purely in safety or in a healthier diet and a better quality of life. Of course, not all these factors are attached to human welfare but I would say, sometimes, we could interpret this model used by consumers as a way of legitimising a concern for something that is not completely accepted as a

legitimate concern. Some people we consulted would say they are concerned about cost because they have to shop for a family. They are concerned about safety, when shopping for the family, because they are responsible for their family's health. Animal welfare seems to be a lesser real issue compared to the responsibility that these factors play within the family. So, it is a way of legitimising animal welfare. It is easier to reach a compromise on animal welfare concern if it is connected to something that is considered more real and more important and of superior value.

There were common concepts used to define animal welfare across the five countries. The concept of humane, especially in discussions of ways of slaughtering, always created discomfort. The idea of killing animals for production, even though most consumers consider it legitimate in food production, is disturbing. So, the humane concept is a way of resolving this troubled area. The consumer generally believes that the one thing that is right in the killing of animals for food is that they should also be treated in a humane way. Meanings of humane mean care for, not suffering, having a good life and possibly death. Natural has already been described as an all encompassing concept which provides the beautiful solution to these issues: the trade off between the cost and the higher level of animal welfare, cost and quality, animal welfare and the food safety and health. Natural seems to be a solution for everything. Natural is a guarantee that things are done according to pre-existing and well-established rules. Natural is also associated with the idea of not changing what is established, what is a traditional way. That has provided a set of guidelines for a long period of time, while the modern systems of production are perceived as more uncertain in terms of the outcomes they can produce.

Another problem that we found in discussing the difference between natural, traditional and intensive ways of producing was what consumers knew about modern intensive production and how they contrasted against they perceived to be the natural or extensive way of producing. This was the area in which participants showed a great lack of knowledge and a great interest in knowing more. Directing the discussion towards what would concern consumers in modern intensive way of producing, the greatest concern was about unnatural, unhealthy, feed-additives such as antibiotics and hormones. Of course the issue of BSE surfaced. We conducted this work in a period in which there was great media attention over the issue of BSE and in the consumer's mind the issue recalled the idea of cattle becoming cannibals because cattle were fed with unnatural food. So that was very much present in the consumer's mind. In the following phase of the research, the interviews, the results indicate that consumers can have 100% concern and 0% concern. The case of BSE and beef is a beautiful example because consumers state that feed is a measure of concern. In beef production, the feed was perceived as the means through which the disease could be transmitted, the feed also transformed cows into cannibal animals. It was also a concern for the animal. It was difficult to distinguish the human concern from the animal concern.

These concerns are magnified in consumers who have children, in which case the parent may avoid certain types of food, beef for example in Italy has been banned in school, and in the UK where it has received much more attention than in other countries. Indeed, the

type of concern is dependent upon various culinary concerns in each country. Salmonella, for example, was reported much more in Italy than any other country, and genetically modified food in the UK.

There were no significant differences amongst the countries in terms of the type of areas the consumers used to work out their concern about animal welfare. Human health and food quality and safety were equally reported. Modern intensive farming systems are considered unacceptable because they are against this kind of self-evident idea of how animals should live. Of course, consumer concern is always linked to human welfare. It reoccurred constantly that good animal welfare could affect food safety and would finally affect human health. Consumers generally believe that the more intensive the production the more unnatural, consequently, unhealthy it is. Unnatural conditions are perceived to be more risky and possibly unhealthy. Consumers with children are principally concerned about the health and wellbeing of their children and, although they are concerned about animal welfare, they have a sense of responsibility for their children and their families in general.

After these qualitative investigations, we tried to generalise to the broader public. What we found out was that the consumption level of meat has shifted from red meat to white meat mostly for health reasons. Animal welfare reasons were not stated or prioritised as reasons for this kind of change. The most important reasons for change in consumption are health, BSE, changes in diet, lifestyle, household proposition and cost. There is a variation in consumers who have even reduced their consumption depending on their concern. For most consumers, changes to consume animal-friendly products meant free-range eggs. Free-range eggs were consistently common across the five countries. They are easily available and easily identifiable as products obtained with a higher level in the welfare. Consumers are most informed about egg production, followed by poultry. And very importantly, they are uninformed or very uninformed about beef, lamb, pork and finally veal production. This information is consistent with media coverage of issues. For example, in Italy, only recently there has been a campaign addressing the problem of hens in cages. And there was much more widespread understanding of animal welfare issues in relation to caged hens than for veal, for example, or other systems of production.

Consumers think that they lack information and sometimes they think it is instrumental to their food choice. They want that information because food producers and retailers, in some conditions, do not want to give information, which might increase concern. Consumers' and animal welfare organisations are trusted more than the Government or the food industry. Those whom consumers think should be responsible for animal welfare are excluded from those who actually perceived to have responsibility.

To conclude, farm animal welfare, in the consumer's mind, is associated with food safety and their own health. It is an association that is difficult to separate. And with a 0 to 100% perception of animal welfare, it is very difficult to distinguish such concerns. Concern for animal welfare is strongly affected by media coverage and scandal. BSE, salmonella, dioxin, all these problems, receive large media coverage and concentrate the

consumer's attention on selected items. Consumers think that is what animal welfare is all about. Lack of information on all the various systems is promoting distrust towards producers and retailers. Concern for farm animal welfare is affecting shopping behaviour of target consumers, not the general consumers. Young highly educated mothers of small children tend to buy what they perceive as higher welfare products, which come from more extensive systems of production, significantly because they perceive those products to be more natural and, therefore, safer. Thank you.

Discussion

Mick Sloyan, Meat and Livestock Commission: Could you elaborate a little on the third point down the conclusion because it seems to me that we're perhaps taking the results of the survey a little too far. The lack of information about the various about animal welfare systems is promoting distrust. From the results of the general survey, I think we found that there's a lack of interest in terms of the purchase decision. Now amongst one or two consumers that expressed concern that may be an issue. But I think that as a general statement is perhaps going too far. I suspect what is promoting distrust is actually more related to the things in the part above it which are things like salmonella, BSE, dioxin and all the negatives that have come through?

Mara Miele, University of Pisa, Italy: Lack of information about various systems is promoting distrust. It was about a specific question 'who would you trust more to tell you about the various systems?' and consistently, across the countries, producers, retailers and Government score very low compared to organisations of animal welfare organisations, environmental organisations and consumer associations. So maybe the wording is not correct but what I meant is when you ask people who would they trust they tell you, they wouldn't trust producers or retailers because they perceive that they do not inform or sometimes they ill-inform. This lack of information is somehow instrumental, for example, not knowing that cows have been, as they perceive it, cannibalised.

Jörg Hartung, Institute of Animal Hygiene, Animal Welfare and Behaviour of Farm Animals: It's quite clear to me that the consumer is like a volatile game, if you'll allow this expression. It's very, very hard to locate his real opinion. What I agree about completely is that the lack of information of the consumer is very often the reason for his answer to these questions, whatever they are. And just showing movies on the television or giving them something to read can fill up this lack of information, in my opinion. My experience is, and I go with the consumers or journalists or whatever through the production units, that very often in more than 90% of the cases we end up with the discussion where they say 'oh I didn't know that it was like that, I thought it was much worse'. So it means that we have this gap between the society and these food production. I don't know, less than 2% of the population is engaged in the production. That's one point. You were speaking about the welfare issue and asked the consumer what is welfare but I'm not sure that I know what welfare is. So we have to find hard data about it and I think that these investigations are opening up a lot of questions. My question is about health, suffering and this general issue of welfare because sometimes if the animals are unhealthy this probably has an effect on the welfare. And there were several times you mentioned the free-range egg system, the free-range eggs are very welfare friendly. If you look at this in reality and compare it to cages or whatever and you have a very high percentage of dead losses and sick animals. So, when you look at animal welfare on the point of suffering and animal health, and what it means for how animals have to be treated, that may give the consumer another view of that. But I agree it's very difficult to bring this information to these people.

Birgitta Carlsson, Animal Rights Sweden: I was thinking if you're going to carry this study further it would be of interesting I think to look at Sweden as far as changes in purchase consumption is concerned. In Sweden, one of the things that has happened, during the last couple of years is, for example, the Prime Minister of Sweden has actually expressed publicly that he's questioning eating meat because of animal concerns and this has been in the media in a very big way. What also has happened in the last couple of years is that a lot of young people have become vegans and there has also been a lot of media and special notices, particularly in schools. Schools have changed their food. There are maybe up to 10% of school children who are vegetarian or not eating meat in schools. There has been a lot of discussion about this, so I think it would be of interest actually to look at Sweden if there is a change because of these changes.

Mara Miele, University of Pisa, Italy: On a point about different types and different meanings of animal welfare. I think it emerged very clearly, and we will talk about this when we discuss these changes later on. There is a different interpretation of what is animal welfare among experts, and people with specific expertise in the field, and general consumers. The difference in information and knowledge between these two groups of people would bring about a different perception of what is the welfare of the animal. As we tried to underline strongly, consumers would say natural is the best condition. Now we know from experience that there is a lot of suffering, including animals suffering in natural conditions. But, even when you read about these issues, the consumers would say that that's sensible because it's natural that's how it should be because their suffering is not our responsibility. We are responsible for the suffering of animals that we put in unnatural production systems that we rear for producing food. Now whether one system is better than another one, some consumers quite clearly judge this on the basis of this closeness to natural conditions. So with free-range, they don't need to know how the animals are killed and how many diseases they can get and how many aggressions they can have and how many problems they have. Free-range seems friendlier than caged because it's perceived as a natural condition. It's something that people wouldn't even discuss they would say that is self-evident. 'How do you think the animals like to stay in a cage even if it is healthy is well kept well fed and well treated? The other system is closer to nature, therefore, it is kinder'. It's very hard to discuss it with consumers, they make a distinction animal health and welfare and what is more important. Is it animal health or animal happiness more important? Who's defining animal happiness? We can measure animal health. What is animal happiness? Animal happiness seems to be more important in the consumer's mind because happiness eases their conscience. So that's the type of dilemma that we had. We decided to offer the consumers' definition and just take as much as we could from what they used to to build up a frame for shopping, i.e. the kind of guide they have in their own minds to inform their food choice.

John Bruton: We're dealing here with profound ethical questions. Respect for different forms of life and I think, in many respects, we're finding we're in a society which has a lot of good feelings, perhaps a deeply worked out ethical hierarchy in their minds. Many countries would see quite marked inconsistencies in the way different forms of life are

disposed of, without being consulted in some cases, and other forms of life are allowed. So these are issues which obviously go to the heart of our civilisation. We now move to the panel, which consists of Andrea Gavinelli, Fintan Grimes, Peter Vingerling and Risto Volenan.

Peter Vingerling: I raise my hand because I want to intervene somewhere in this discussion about information to the public, do they want to be informed, yes or no? Can their heart be easier if they're not informed? I simply do not agree with the gentleman on the first question over there. He said if I show them what's going on they are very satisfied, so we need to bridge the gap between reality and their images. If we would show the public the way, for instance, our poultry is raised, how our meat is raised we see high mortality rates within the 6 weeks that they are going to be raised to us to kill. We see losses due to transport, broken bones, broken wings. So, if we are looking to those images then maybe the shift from red to white will be changed again from white to red. So, this is a question of information and what you see is why are people turning away from the problems to other meat. At last, when they make a circle, they are starting to wonder whether or not they should go and change their whole behaviour into less meat or being vegetarian. It is this kind of discussion we are looking at here and the only way we can really overcome the problems in the future is to go to more quality labelling systems. Show what you do, have good quality of the whole rearing system and safeguard that into a quality of a whole chain. Be transparent about it and then we'll do the consultation with the NGOs and others who are blaming you for not doing good. You have to go out and say what you're doing and change your behaviour.

Andrea Gavinelli: Good morning everybody. Yes, of course I do have notes and things to say associated with the work of legislation of animal welfare. That means really trying to cope with the scientific definition of animal welfare. At the same time, the perception of the people that legislation, as has been presented here, is necessary, is important and if they're looking for animal welfare warranties, they are looking for a good system of legislation that is trustworthy. I can read between the lines, in fact, in this research and, as someone involve with future works, there is a necessity for a clearer system of information for the consumer that they are assured of everything. I think that's something that's already been mentioned. But based, also, on a transparent system between production and consumers. The Commission is already shifting the pole of legislation towards consumers concerns. It's quite a good system that animal welfare legislation, as a protection, is following a shift in the European Community to a clear-cut position to work for the consumer's protection. It's quite a clear-cut position of Mr Byrne's, the Commissioner for consumer protection, insisting that the position is related to animal welfare, and insisting on animal welfare being one of the tasks of the future of food and productivity. We had to work a lot to get consensus around this and create legislation for welfare. This is what would be the insistence of the Commission within its proposal and what we did with pigs and what we are going to do with transport. We are also targeting other areas, in food production. What is important to say is that the Commission funds these areas of research. Indeed, the Commission funds this research. The results are really useful and they are going to be a guideline for consumer protection

directly. I have no time to go deeply into all the possibilities and all the questions that I would be pleased to put on the table for all of the people around here. I guess that concludes the comments of the Commission. Thanks.

Fintan Grimes: My question would be in relation to the survey. I want to ask a question in relation to welfare tests to the consumers, and the acceptable levels of suffering in natural environment versus the alternative scenarios, stress, disease etc., and also what are the implications for food safety?

Risto Volanen: Animal husbandry is something like a 10,000 years old business because 10,000 years ago humans got involved with nature. So, by definition, agriculture and animal husbandry is human intervention to nature. Still, in the European tradition, humans and living nature was understood to be very dependent on each other. Aristotle has even said that humans are a version of animals, social animals. Also, in Christian beliefs, there are many ways of communicating with both humans and animals. And this animal husbandry formed much of the European farming tradition. Then with modern living, Karl Marx defined animals themselves as machines. Since modern living, nature has been defined as mechanical, as basically a mechanical instrument in order to do something. Karl Marx took this position. So, for 200 years, there have been demands on farmers to produce more food and it has been a fantastic change. There is more food now and it is cheaper and better than ever in world history. Now we have obviously something new which is happening which we don't understand completely. We are getting, in a way, diminishing returns. Just as in any other part of our economy or activity, we can have new capital inputs to animal production without getting diminishing returns. So, this is how so many people are reacting, like animal welfare people. And now the situation in Europe, and world wide, is that the farms have become the battlefield of a lot of wars. There are so many special interests continually demanding us to produce for the world market at low prices. All European policy and markets push us to the world market. At the same time, there is a focus on the environment and animal welfare, and so on, and what this means for the farmer is all the forces of the modern economy and consumer organisations. For instance, the consumer says I want more food, so the farms have become more productive. At the same time, we have the social special interest groups and many farmers think there's pressure for us to go more productive. So, how then can the farmer, in the long term, be in the world and young people are now recognising it's impossible to get farming opportunities. You can't simply, in the same farm with the same farmer, increase productivity and increase production. So, this is the state farmers now have and animal welfare is just one aspect of this global picture. With consumers and citizens, because they are still people who are taxpayers as well as those people in the supermarket, there seems to be middle ground. People are, after all, reasonable people. Of course, better information about animal welfare is fundamental, as is what I want and what is the price. There is a middle ground. And I suggest that we should study now very carefully what this middle ground is so that, on a scientific basis and with consumer perception, we can find what is the middle ground and what we in Europe call in practice multi-functional. Family run farms, multi-functional, responding

to all the demands of society. Multiple demands for multiple functions. But what is fundamental is that in this war there must be a peace.

We've no wish to run down the classical animal husbandry in Europe and the key options now are, recalling the problems on competition, we don't know very much in Europe about really intensive farming. Go to Colorado in the United States and you'll see 100,000 cows side by side in the valley. Dairy units in the United States you get 5000 - 6000 animals in one single unit - purely completely industrialised. We have similar possibilities in Europe to develop our farming system on the basis of existing farms. We have this industrial model and I repeat to you, take care, we may be fooled because there's one current now that lets all these forces proceed. Let animal welfare people get their farms, let the environmentalists get their farms, the landscape people get their farms and we have this model for policies that is pleasing the people. And then behind there are policies for the world market, for global competition and for concentration. So, as I said, we must now have a democratic process, so really consumers and citizens can all communicate on the basis of real information. Who knows what is modern farming today. Is there a single crazy farmer in Europe who will say that he will make the animal's life difficult so that normal production would probably decrease. It is the fundamental interest to the farmer to have healthy animals, happy animals so he can carry on his good work and it has been for years. The basic ideal farmer in the critical production function and husbandry function also means the animal welfare function. So what I say is now let's use this research, let's have the focus on citizens. Europeans can just say what they want and what they want to pay and are happy to hear that there is middle ground, just balanced with the issues.

Peter Vingerling: Thank you Mr Chairman. I would like to take another approach. First of all, we have to propose to the treaty the intrinsic value of animals and bear that in mind for the drafting of legislation, but also we expect farms to act on that when they are looking after animals. Now the middle ground. Whilst it may be looked at, when we were talking about animal welfare in the days before the dioxin, before the swine fever, before the BSE, before foot-and-mouth disease, dramatic situations have shifted the description away from square centimetres to square metres etc., to the structure of the industry to the phenomenon of the bio-industry, and the feeling, the general feeling, that it's all wrong and should change dramatically. And, in fact, you see the discussion is no longer going 'let's give them some more space' or something of that, it's concerning the natural and healthy against the unnatural wide industrial picture that people have in mind. That is the question. And the question is then how our Governments and our politicians are responding to those situations. What you see in the Netherlands, for instance, is the first priority our Government said we are no longer going to increase animal welfare step by step by this and that slightly more space, slightly more straw, slightly more this and that. Now we're talking about a dramatic change of the whole system that includes the supporting mechanisms. Our Government wants to go away from price supporting compensations to farmers by giving them a premium of exports or volume. We are going away from that, we are going to see how things like food safety, animal welfare and rural development can be integrated into new systems. Those systems should be supported by

price-supported mechanisms, like lower VAT, for extensive systems, for instance. Subsidies for changing the industry into the right direction, those things. Besides that, our Government says we want to have integrated systems so not one quality aspect but all the quality aspects in systems benefit, and we make them transparent so that people can see what the system is all about, so we have to give information by the label. And those labels should be structured as well so you can't give false images. At the same time we say, in fact, that we should encourage market mechanisms etc.. So how do we do that? What you see in the Netherlands, and this question has been going since priority work in 1997, is groups of farmers and, in fact, our whole industry, saying okay we are choosing this dramatic change. We are against certain countries, protected by WTO agreements, and prefer that our Government help us to create this new situation because you cannot say we've made this possible for 40 years, by investing in all these systems, and then leave the change to the market mechanism. So you have to support it but you have to support it in a way that you will make a change and do not stick with the old bio-industry as we know it today. And I see that we will face, probably in 10 years, a dramatic change in the quality and probably lots of farmers will go bankrupt in this process because they cannot go with the higher requirements we are asking as a society from them. But you have to do something about that as well, of course. But that is why we're handicapped at this moment in large parts of Europe. And I see this as a question of time, a question of proof, let's say pictures given by NGOs to the public, and farmers could get a payment in those countries to support those changes.

Andrea Gavinelli: You are lucky because there are so many good experts here. I think the discussion is very important. If European policies are going the way that animal welfare is, customers' concerns are going in the same way, and it's because there is a full co-ordination of all the relevant systems, consumers and producers. The example was the discussion of whether, during the last six months, elements of the system, producers, consumers and legislation came together at the same time. There was a big success from this. A global competition is always a shadow on top of everybody during this discussion. But why? Because if we took this example, look at what we are exporting from the EU. We are exporting a lot of pigment from Denmark and Denmark is the leader for animal welfare groups. I'm thinking about legislation because it's my profession. And they are the leaders for exporting pigmeat from Europe all over the world. But if we look at what happened to the export of live animals, apart from all the issues of treatment, and if we look towards what is happening in Ireland. Ireland is one of the biggest exporters outside the Union. And this is a country with the highest welfare rules for transporting and shipping because of the codes from the Irish Government. And I mean to be clear, legislation on welfare is working and is converting certain land that is the chain that makes the system work. But from those welfare standards how much is lost in welfare? How much is animal welfare legislation costing because it is something that, to be clear, when we draft legislation we ask how much it costs and on the table we never found figures, that is amazing.

The basic case is quite a good indicator. The better information we have, and let's have the consumer perception on real cases, concrete cases, how real life is on the farm, and

let's, on the basis of this information, set the ground rules and, of course, for the environment and many other aspects of farming. And let's have an idea of what it costs. Part of that can come for the market, part for animal welfare, in the middle you have the pig in your hands, and you don't see how it's produced. Part of the market quality is animal welfare, and the environment, for the market and then you've got the quality and market function. Then we have policies in pig meat and welfare legislation now, but we can't apply the same rules for the products for the free world. So, if we want to have this operation in Europe then we must somehow handle the import problem. Export problems are easy because we have better quality. Import, we have a problem, we haven't the criteria for animal welfare. So we need to work with this. And about the labelling. Labelling does not solve this problem. Why? Because every product on the market must be safe, every product in the market must be sustainable. Every product in the market should follow the ground rules also for animal welfare. So, you have to be in the market to be labelled, to be acceptable in the society. So let's have a market where you can add to these ground rules something on the basis of consumer needs. And what I hear from the Netherlands now is the consumer. This policy interest I heard now are just opposite what they are targeting because if you know the mainstream farm in Europe, what is left is industry on the one hand and a special interest policies, on the other hand. And, as I said, for mainstream farming, farming on the basis of this common ground should now be developed which obviously is determined by objective, veterinary information on the one hand and then the consumer perception on the basis of concrete farming basis on the other. Thank you very much.

John Bruton: I now have the honour to introduce a fellow Irish person, Hilary Meehan, to present the final part of the presentation of the study which concerns the impact of consumer concerns about animal welfare and the way people make consumption decisions. I will now hand over to Hilary for her introduction.

The Impact of Consumer Concern about Animal Welfare on Food Choice

Hilary Meehan, National Food Centre, Ireland

I want to go through consumer consumption patterns as we found in the survey. So, just a brief outline of what I plan to talk about this afternoon. I'm going to give a very brief overview and then I'm going to look at consumption and how consumption has changed. Also, we want to know what the impact animal welfare has on consumption, how many consumers are actually saying that they select welfare friendly products, how consumers consider other barriers to changing their consumption and then I'll give you a brief summary. There are 5 countries involved Ireland, UK, Italy, Germany and France and what I want to look at this afternoon are differences between the countries, between genders, and between social classes. We have considered certain products: beef, pork, lamb, poultry, veal, eggs and milk. In terms of consumption, the type of question that we needed to ask consumers was: what is the frequency of consumption of these products? We wanted to know if there was greater decrease in consumption of red meat versus white meat, eggs and milk, because this is what we found in the literature. We see in the literature, that consumers are making this switch from red to white meat. We also wanted to look and see whether more males had decreased their consumption. And, furthermore, which of the socio-economic groups had decreased their consumption.

Milk is the most frequently consumed product across all countries. Lamb and veal overall had the lowest consumption frequency across the 5 different countries. And there were high levels of consumption of pork, poultry, beef and eggs. Looking at that in terms of eaten products, we can see that eggs and milk were highly consumed in all of the countries. Pork was the most frequently consumed in Germany. Ireland had the highest frequency consumption of poultry. This is also true of beef and lamb for Ireland and for France. And veal, as one would expect, had the highest frequency consumption in both Italy and France. So what are the 3 main research questions that we want to ask about reduced consumption? We want to know how it has changed over the last 5 years, whether it's more, less or the same. If it has changed, what are the reasons for the change. And have consumers changed the consumption of animal-based food products over the last 5 years specifically because of the way farm animals are treated. We can clearly see that beef consumption has decreased overall over the 5 countries by 30% according to the consumers we surveyed. Poultry consumption had increased overall by 17%. So basically this is addressing this whole question of whether there is a switch from red meat to white meat.

If we just look at gender changes in consumption, we said that beef had a greater decrease and what we found in the survey was that a greater percentage of females to males had reduced their consumption of beef. It is also true that a greater percentage of females than males reported they had increased consumption of poultry. And, in terms of lamb and veal, females had also reduced their consumption more than males. Taking total meat and poultry overall, more females than males decreased their consumption with the

exception of Italy. Looking at changes in consumption by social class, social class was of less importance. Poultry was the only product where there was any difference between social class and change in consumption. More ABC1s were eating more poultry than C2DEs. And more C2DEs were eating less poultry than ABC1s. We asked the consumers why they changed their consumption of these animal-based food products. This is an open-ended question so we're asking them to give us the reasons, not prompting them for specific reasons. The main reasons that we found were due to the impact on human health. Animal welfare and ethical reasons were among the lowest cited reasons for changing consumption. Other reasons that consumers gave us were food safety issues such as BSE, quality in terms of taste and fat content, changes in diet and lifestyle, personal changes and cost of products. The UK had the greatest number of consumers who said they had not changed their consumption because of the way animals were treated in production of food products at 38%. This is quite interesting really when you consider they are a nation of 'animal lovers' and we were interested to note that Ireland had the greatest percentage of consumers who said they had decreased their consumption or substituted their consumption.

For all those that had reduced their consumption, looking at them by gender, what we can see is that there are differences between the countries. Italy, Germany and the UK had some significant differences between the levels of consumption between genders. What this shows here is that, taking the UK or Italy, there's greater difference with 30% of males reducing consumption and 70% of females who were reducing consumption. Of the overall sample this relates to 23% of males who reduced their consumption and 39% of females. In terms of social class, we can see a pattern here of before. There are no differences in social class and consumption. What we can see very clearly is that beef is the product most affected by the concern about animal welfare. Taking those products by country, beef again is being reduced due to animal welfare concerns in 4 of the 5 countries. It is the main product, with the exception of France where poultry was more pronounced and showed the path for the second highest decrease in consumption. In the case of Italy and Germany, veal was the product that had been reduced in consumption the most.

We asked the question: who selects these animal friendly products? The answer is more women than men and more ABC1s than C2Ds. In terms of consumers who select them, we can see here that 77% of Irish consumers said that they tended to select animal friendly alternatives. And Germany and France follow this with 64%. Looking at the gender differences again, we can see that there are some significant differences between males and females for Germany, the UK and some slight differences in Italy. Looking at social class, there are no real significant differences between social classes. Overall, free-range eggs or free-range poultry tended to be the products that are chosen most frequently due to concerns about animal welfare.

We asked consumers about the barriers to purchasing animal friendly products. There were variations in reports of these barriers. And, of course, there were differences again between males and females and ABC1s and C2DEs. The barriers that we looked at were

information, availability, influence, disassociation and cost. In terms of these barriers, we were looking at lack of information, not widely available, not able to affect change personally that would it make a difference, completely blocking the product out of their mind and the fact that price was important. Although all barriers were important, lack of information came out of the survey as being the most important barrier to purchasing animal friendly products. Again, if we look at barriers and consumption by gender, if we look at information, there we can see that females tell us how a lack of information was a greater barrier to the consumption of these products than their male counterparts.

To summarise, consumption patterns, it would appear from our survey, have shifted from red to white meat. There are more women than men, and a greater number of ABC1s, who have increased their consumption of poultry. The main reasons for changing are food safety, BSE, health reasons and a change in their diet. Other important reasons that are cited are lifestyle, household composition and cost. Animal welfare concerns are insignificant in terms of the change in consumer patterns. The number of people who spontaneously associate with this is quite minimal. Conversely, many consumers claim that animal welfare is the key reason for change in consumption. And again more females than males seem to be reducing their consumption because of animal welfare concerns. Although few stated that they reduced their consumption because of their concern of animal welfare, it varies greatly over the 5 countries from 38% in Italy to 77% in Ireland. The claim is that the Irish are selecting the most animal friendly alternatives. Again females are more likely to select animal friendly products and those products such as free-range eggs and poultry. Finally, the two main barriers a lack of information and lack of availability, and these barriers are of equal importance in all countries.

Discussion

Mick Sloyan, Meat and Livestock Commission: Just really clarification, firstly you were dealing with perceptions of people's change in consumption pattern. Have you actually compared what they perceive their percentage reduction to be against what actually happened? That's my first question nationally. So for example, if you had a 30% reduction in beef consumption is that visible in other data or are we just dealing with people's perceptions in what they've done compared to what they actually have done? Our experience over BSE in 1996 was different, people said they did things but in reality they actually didn't. And secondly about the barriers to change. I'm a shade confused about that. You said that people on a spontaneous basis didn't really mention animal welfare then you had people prompted who said they were consuming welfare friendly products. The barriers was the bit I didn't quite understand. Is that a barrier in the mind of those that are selecting welfare friendly products or is that a barrier in the mind of everybody who you actually showed?

Hilary Meehan, National Food Centre, Ireland: I'll talk about the barriers first. The barriers are in relation to the entire sample, not just those people selected to represent the barriers so this for the entire sample. That's the first part of the question. The data is really about consumers' perceptions of what they're consuming. I think if you were to look at actual consumption of the patterns then it would be more in line with what they bought. This is just dealing with their perception of how have they reduced their consumption.

John Bruton: If they're telling you the truth, I see the Irish people are the highest in their concern over animal welfare, quite markedly higher than the British people, is this just that the Irish people feel the need to give politically correct answers and the British people don't or is it just the way they actually are?

Hilary Meehan, National Food Centre, Ireland: I'd suggest it might be a bit of both but I think what that shows 77% of consumers said they tend to select these products but when you ask them how often they select them you find that there's less of them, they're only rarely or occasionally selecting these products. So yes, they're not telling a lie when they say that they do buy them but the frequency of their purchase is quite low.

Jörg Hartung, Institute of Animal Hygiene, Animal Welfare and Behaviour of Farm Animals: Another comment on how the British reacted, because the reason is they were questioned by an Irish woman. My question is concerning this 5 years period of consumption, which years were they? Was that up to 2000 or on?

Hilary Meehan, National Food Centre, Ireland: Yes, they are 5 years up to the survey in December 2000. We asked people over the last 5 years.

Jörg Hartung, Institute of Animal Hygiene, Animal Welfare and Behaviour of Farm Animals: OK, then it's a perception because the factual consumption of most of

these meat types are back to normal, so to speak. Another question. Why do you think there was no difference between the social classes concerning the animal friendly meat and the normal meat? Is that, perhaps, because the animal friendly produced meat is so cheap that everybody can buy it? Is that a question of cost or is it just not a question of perception or a lack of perception through all classes?

Hilary Meehan, National Food Centre, Ireland: We didn't really explore the whole issue of why was a social class consuming less or consuming more. I've had this discussion a few times, I genuinely think that maybe we're not seeing significant differences between the social classes because these social classes as we would find them are changing. Maybe those classes are not the best way to look at what we planned, in Ireland anyway, in terms of focus groups. Consumers from all social classes are concerned and for those who maybe are in a lower social class they maybe prepared to buy less meat but that meat to be of a higher quality. So I did not actually ask the question, but I think the barriers between social classes are changing.

Jörg Hartung, Institute of Animal Hygiene, Animal Welfare and Behaviour of Farm Animals: There is an opinion that our food is far too cheap in general so that is obviously independent of the income of the classes. Everybody can go and buy the better quality foods.

Hilary Meehan, National Food Centre, Ireland: We found that basically this whole family lifestyle actually played a greater role than the social class. Because I talked to a number of consumers and what they said is that basically if they didn't have 5 children then they would buy the products that they wanted to buy but with 5 children to feed the cost prohibits them from doing that. So if the desire to buy is there.

John Keane, Irish Food Board: We've been working with a group in this project and the results are very interesting. My general comment is that the common theme that has run through the 3 presentations is I suppose overall a quest for more information and I just wonder if the panel, the academics perhaps more than the panel, how this information can be communicated. Because, in a practical sense, it is very difficult to communicate this kind of information to consumers. For example, if for argument's sake, you claim that food is safe then you're implying something else isn't safe or wasn't safe last month. You raise the spectre of all kinds of issues that maybe the consumer doesn't want to know about and are much better off not knowing about. Or, even if you talk about welfare conditions of animals you're suggesting that something else might be less welfare friendly and then contrasting something else and you're raising all kinds of issues. So, I just wondered if you had any thoughts in relation to how those kinds of complex issues could be communicated? And a connected question is that one of the processes that's adopted in a lot of countries, including Ireland, is that if you hear the term quality assurance or farm assurance, and this kind of terminology it's widely adopted in Ireland where there are standards put in place, animal welfare and food safety and so on, and all manner of what we call quality assurance emblem or a food firm quality assurance emblem or something of that nature. I'm just wondering if, in your research, did you

discover from the people you interrogated if they had any views on what those symbols mean? Or are they confused by what quality assurance means? Did you get anything in relation to that in your work? Thank you.

Hilary Meehan, National Food Centre, Ireland: Going back to the second point first, from the Irish perspective, they did tell us about quality assurance and they did know that sort of information. Some consumers knew what the emblem was and tried to search for it when shopping. And the way that the Irish Government presented them actually gave more trust to the quality assurance label. That's what we found in the strategies. I think in terms of the first question about the issue of information, hopefully Gemma, who will talk after me now, will talk about those strategies where they did find this information and how they would like to receive information. But, again, I would say that the development of strategies is open for discussion and we'd like to receive comments from the floor to try and further promote discussion how to address this issue.

Policy Implications of Consumer Concerns about Animal Welfare

Gemma Harper, The University of Reading, UK

Thank you very much. I'd like to apologise first of all for Spencer Henson not being here and for not having his presentation. What I will do is to describe to you, now that you've discussed the nature of the concerns, what we did next, very briefly, and expand strategies for policy. One of the major aims of this project has been to devise strategies to address consumer concerns. Once we'd conducted this survey a lot of you attended the Brussels workshop with food producers and animal welfare representatives and policy makers, to discuss the results as they stand and also to try to construct some sort of strategies that we could use to address these concerns. On the basis of that, we went back and conducted another series of focus groups and it was in these focus groups with concerned consumers that we discussed various strategies. We put together, not only the results of the project, in response to which they agreed with the kinds of things we already found out, but we also presented them with 5 scenarios. I'm going to describe to you the scenarios, what they are and, briefly, what consumers thought about them and to raise issues that have come up.

So we presented the consumers, who said they were concerned about animal welfare, with the compulsory labelling scenario:

“In this case, the way to address consumer concerns is to label all animal-based food products so that the consumer can tell how the animal has been reared. The producers would have to label food products so that the information is clear, straightforward and easy to understand. In this case, labelling would be a Government requirement and would describe methods of production for the animal. Methods of production, such as ‘free-range’ would be defined by scientists and experts in the field of animal welfare.”

This scenario involves labelling all products and the issue of information here is how to label. What it should say was an important issue in terms of how that were to be produced. We also showed hypothetical labels, which gave pictures, descriptions and logos.

The second scenario was minimum standards of animal welfare:

“In this case, minimum standards for each species would be set by scientists, based on current scientific knowledge, taking into account the cost of complying with standards and the practicalities of farmers achieving the standards. The standards would be enforced through Government inspection and the farmers would be subject to fines if they did not comply. Each animal production system would have to correspond to specified levels of animal welfare which are defined by scientists and experts in animal welfare.”

The third scenario was change in agricultural policy, specifically the common agricultural policy:

“In this case minimum animal welfare standards would be set for each species by scientists, based on current scientific knowledge, taking into account the cost of complying with standards and the practicalities of achieving such standards. Currently all animal producers receive financial support under the Common Agricultural Policy (CAP). In this case only farmers who meet the specified animal welfare standards would obtain financial support from CAP.”

We also talked about education of consumers, so a general information strategy, which would be nationally based would begin with the education of children in schools, which would inform consumers about the way different animals are reared in different systems:

“In this case, consumers would receive information about current animal welfare standards through a national information campaign on television, in newspapers and magazines and on billboards. Supermarkets would also be required to provide poster information next to all animal-based food product standards stating how the animal was reared and transported. Leaflets would also be provided for further information. Children would be taught about farm animal production and animal welfare in school.”

We also talked about the idea of quality assurance through launching a voluntary code of practice for all species:

“In this case, farmers would voluntarily sign up to a national code of practice, which would include the training of animal producers and handlers in animal welfare. Farmers would be inspected, and standards would be enforced, through an independently audited quality assurance scheme. The code of practice would be based on an animal welfare scheme, available to the public, and all products under the scheme would have a logo on them indicating that the animal had been produced to the scheme’s specified standards.”

There were very interesting sessions on each of these proposals and the groups presented their ideal situation. To give you a brief summary of what the consumers said, they wanted minimum standards and information about those standards. They wanted was a general campaign of information about the way animals are produced; specific posters next to displays in supermarkets that they could refer to; and a logo system on the product which could be something as simple as colour coding. They wanted relevant information, they certainly didn’t want information on slaughter, and they wanted to look at it and say that is a welfare friendly product. That leads immediately to the question that John raised: do you label all products? Do you want to label all products in a similar way, how are we going to know? There’s debate but some people wanted everything to be labelled. Some were saying we don’t want it to know everything, essentially they wanted the option of a particular system but not to know about those systems that they didn’t necessarily approve of. Again, it’s an issue of consumers wanting some form of information that ultimately makes them feel good about the purchase. Consumers don’t

necessarily know, but they want to see what it is they're buying, for example, they are keen to know where a product is reared. Country of origin is very important.

In terms of changing the agricultural policy consumers again want to have this information. They're keen to see changes that will provide incentives for producers to produce to higher welfare standards. They wanted to see the reforms at a structural agricultural level to improve welfare and provide incentives for producers to meet higher standards of welfare. And that led very much to a prevalent and acceptable idea of a minimum standard. First of all, they thought a minimum standard was in place already for all species and, secondly, they wanted those standards to be in place if they weren't. They wanted those standards to be decided by animal welfare scientists. Again we didn't want to get into the nitty gritty of what that means but they want standards to be met, they want farmers to be encouraged to meet those standards and, at that level, they want to be informed clearly, on their own terms.

What they weren't particularly interested in, and they didn't particularly think would work in terms of addressing their concerns, were the voluntary assurance schemes. It was extremely interesting and this was a view that many had. There is a number of assurance schemes in the UK, for example, for almost all types of species, all kinds of food production. The consumers' complaint was they don't trust that, they don't trust the marketing and again it comes back to this issue of information. The consumers are demanding the information and, when you present it to them, they are not necessarily going to believe it and it's almost, for the consumer, a get-out clause - they want more information from the Government and the food industry, but even when given such information, they are unlikely to believe it. It comes back to who should they trust, who do you want to provide the information. And so we get into a kind of circular debate about what to do about the issue of information. In these recent focus groups, consumers wanted to be more informed, they want minimum standards in place, change in agricultural policy and everything to be labelled.

When it comes to imports into the EU, consumers generally aren't aware of trade issues and WTO; they want those animal welfare standards to apply to everyone. That's how they see a solution to the issue of having imports that are sold cheaper, leading to European farmers being put out of business. So, in the consumer's ideal world, these problems are solvable and in our world we know that they are very far from being solved. We have already seen that there are so many agendas from different sections that coming to some sort of workable compromise on international trade becomes even more difficult. The consumer is not worried about that kind of thing. From their point of view, they don't see why it can't be the way they want it to be. Consumers want one thing and want something else at the same time. They say one thing and they do something else. That's very much what the focus groups have been about. So we now know what consumers think can be done to address their concerns.

What that doesn't tell us is what really can be done and that's now the point we're at. We have all this information, I think very good information on the nature of the level of the

impact, all the type of information that consumers want, what we need, in this arena, is to find some sort of workable solution to develop policies that also will address consumers concerns. And I think one of the key issues for trying to reach some sort of consensus on this is the extent to which you take on board the issues that were raised by consumers. They believe animal welfare is an important issue and it's the issue they want to find out about. They want changes to be made but actually engage in minimum effort, tending to abrogate responsibility when it comes to not seeking out information. When it comes to solutions they clearly want a legislative approach. Producers and retailers favour the market approach and, at once, there's a case that we have either/or. It maybe that we move forward as an integrated system. But one of the questions we could perhaps target this afternoon is the extent to which we base our policy recommendations on what consumers are saying to us and the extent to which we take up the sorts of information which we hope will address their concerns at the end of the day.

Discussion

John Bruton: Thanks very much. I won't attempt to summarise what you've heard today but what has come through very clearly is that fundamentally consumers have issues from the perspective of their own family and themselves rather than from concerns of animal welfare. In terms of our general welfare, animal welfare comes further down their actual decision making hierarchy. I think it's also fairly clear that there is an ambiguity on the issue of consumers wanting information. They may well indeed be using the lack of information as an excuse for doing things that they would not wish to admit to doing them for the reasons they are actually doing them for. Of course this can change. I think it's important to make the point that this is a survey of consumer attitudes at a particular point in time, at a point in time where the debate on animal welfare could be said in the western world is only to be beginning. We have come through very dark period of history in which animals were treated as objects to be manipulated purely at the will of humankind. That wasn't always been the case, but it has been the case for a long time and we're seeing those attitudes change. So clearly, it is at least a good sign that at least people are thinking about the issues if only superficially. Fifteen years ago they wouldn't have been thinking about how they feel superficially and maybe 15 years from now they will be thinking about acting upon them much more profoundly.

The debate takes place against the background that, for many countries at least, we want exports outside the European Union to survive. We want to impose much more stringent animal welfare requirements on producers who are exporting into markets where the consumers aren't worried about animal welfare. Competing with other country exports, which don't have the welfare standards we have, would be to put our exporters at an artificial disadvantage, financially speaking, and ultimately it wouldn't take any length of time to put them out of business. Now that's something that we have to accept and it's something that has to be tackled in the next trade round. I know when people went to Washington to discuss the world trade round they were told by the Americans that animal welfare issues are not even on the radar screen as far as issues that could be taken into account in trade. So, clearly, while we may be within a European market for food, we're in a world market for ideas, and for the world market foremost as far as ethics are concerned.

Clearly, if we want to influence the debate or have a more positive approach to animal welfare, in our own jurisdiction, we've got to get people in other major economic powers to start thinking about the same issues in the same way as we think about them. I think, therefore, the European Union has not just to conduct itself in the world trade round, which may be launched at the end of this year, although it seems less likely than previously thought that it will be. We've not only got to try and use animal welfare as an argument in those rounds for standards that we wish to be included in the round but we've also got to try to talk to public opinion in the other countries in Australia, in Egypt, in north America to explain to them why these issues are of importance, of genuine importance for themselves. And that's an area where I think we need to do some fairly serious thinking ourselves. Because in a sense what we're facing here in this debate

about animal welfare are questions like what is life? What life should we value and how much should we value it? Previously, the only life we valued is human life. We're moving now to begin to value animal life. That issue clearly has implications not just for animal welfare, it has implications for experimentation on animals for finding human diseases and cures for human diseases. It has implications also for issues like abortion because a life exists prior to birth, does it have rights in the same fashion as animals have rights? How much does it feel? How much does an animal feel? We don't know. How much does a foetus feel? We don't know. Is research on embryos justified? If it is justified, is research on animals justified or are neither of them justified? These are very profound questions about the essence of what we value in others, whether they be other human beings or other life forms. And the truth here is, to my mind, that no expert is going to answer those questions for us. There is no point in setting up a panel of experts to tell us in terms of life. Experts can tell us the consequence of particular actions but, ultimately, the issue of what is valuable is a value judgement and a value judgement is something that each one of us must make for ourselves.

Now we may decide to affect those valued judgements in different ways. We may decide to affect those value judgements freely as individuals by looking for masses of information on the pack of everything that we buy and make those decisions ourselves and it seems, from the research, that consumers are not all that keen to do that because they haven't time to do research. But it's not only to be done at that level it has to be done by the European Union, by the World Trade Organisation, by US Congress or by our national legislatures or by our local legislatures. But if it's going to be politically determined it's going to be controversial. If the issue of the question of what rights should be protected and how far they should be protected should be dealt with at a political level it's going to involve a live political debate where politicians are most likely to have to take stands on the issues. And, rather than simply trying to delegate, they'll have to acknowledge that these are very difficult issues. I think it's also important to recognise that what people tell you initially is going to be their attitude to a particular issue isn't necessarily the attitude they want to take when the final decision comes. It's an unrelated question but if this was the same, I look back on my own political career, one of the things that set Ireland apart from the rest of Europe is that we didn't have divorce. We have had to introduce divorce in Ireland in 1986 and the majority of the people in all the opinion polls were in favour of divorce until the last opinion poll taken 2 days before polling and suddenly people were against it. And they voted against it 60:40. People didn't want it to go through, they were actually against it but they felt it wasn't the exact answer that they'd given the opinion polls. The same nearly happened in 1995 when they did on that occasion get it through. So, I think you have to be very wary of what people say, it's really not necessarily what they would do. And one must not be lulled into believing that you have people with you until you're absolutely sure that they are actually with you and are prepared to make a sacrifice themselves and change to make a sacrifice in all circumstances, that they're actually prepared to make a sacrifice to affect a change they say they aren't always telling the truth.

I agree this is a very important subject and it's a subject we'll be hearing more about, I've no doubt that this survey is going to fuel a wider debate and I think it will lead to change and it will lead to significant change for the better as far as animal welfare is concerned. That will only happen if it is followed by a wider debate about values and what constitutes in view of our history, civilised life and civilisation. So, with those few words, I'll open this to the panel and to others who wish to contribute.

Anne-Marie Neeteson, Farm Animal Industrial Platform: Can I just pick up on what you just said? When you said OK that's what people say and what people do, and we have had a presentation of this afternoon one of the conclusions I had whilst listening to the first presentation is that, as far as animal welfare is concerned, you have what people say as the citizen side of the individual and what people do as is a consumer penny pocket attitude, so that's an opinion from the first presentation. As far as farmers are concerned, food safety is paramount, it doesn't come into the question as far as information is concerned. I think that we all agree that any label that has to be done is not essentially for safety, it's extra information, it's not a way of going around food safety. I have one question that is one statement. Have you asked or have you defined animal welfare when you were doing the survey? Meaning did you make the distinction between a way of producing the meat or the way you were treating the animals in order to use meat based products? Because, for farmers, I think from history, it's important to say that animal husbandry has been natural for farmers, it's part of their every day work. For practical production reasons they have to ensure the welfare of their animals just to keep them from suffering pain and provide good conditions for the health of them. So this is also paramount for them and I would like to state that clearly.

The second statement that I would like to make with regard to the presentation is I think farmers have always tried to produce what the consumer wants and this is what is happening. So, the consumer seems to be asking we have raised standards, and we have raised welfare standards. And I anticipate that we probably have the highest welfare standards in the world. We're very interested with the Commission's report comparing welfare standards throughout the world and our standards; we're always asking for that. And the second thing is we were very much in favour of labelling and we may not have the same requirement of the Commission and we had to adjust it, for example, in the Directive, we saw it as appropriate to tackle foreign imports just to write 'these eggs have been produced within the framework of EU legislation' or they 'have not been produced within the framework of EU legislation'. This meaning that if you entrust which is what the consumer seems to want a legislative framework if you say it is EU legislative in favour of good quality normally you shouldn't have any problems because you can take legal advice. So that was my first reaction.

Mick Sloyan, Meat and Livestock Commission: Can I just follow up on that with a couple of comments really trying to give it my perspective a little bit having been involved in the project, where we've come to. I think it's very important to look at the research and actually to follow it through. I think this is quite rightly going to stimulate the debate and I think it's a debate that will be welcomed. But what we can't do is

actually lose sight of what the research actually said. What the research is showing is, in the first instance, when you ask people about whether they are concerned about welfare and are prepared to take action on it the answer to that is no. There is no action currently being taken in terms of purchase decision in relationship to specifically animal welfare. There are concerns that exist by that and they have been wonderfully flagged through this piece of research that could have thrown all sorts of confusions and they delve down and they bore down into finding out of those consumers that express concerns what those concerns are.

When we get down to the point we arrive almost at a conclusion that says we will ask concerned consumers about what it is they want to see in terms of a change in the public policy. Finally, the question we have to ask ourselves is are we looking for public policy to be driven by what could be a relative minority within society. So, that's the first question I was going to ask. Secondly, I'd like to support what Gemma says and get a reaction of the panel about the comment of the co-existence of minimum standards and market driven initiatives. Because I believe those two can co-exist quite happily. And I actually think they're probably the best way of achieving change. It's always unwise to argue with the chairman but, on this little piece, I think I will I think we're doing ourselves down if we actually say that we've suddenly recognised the settings of animals and, therefore, animals' welfare matters. If you actually look at the history certainly of the livestock and meat trade, you will actually find a long history of the establishment of legislation to guarantee animal welfare. This is a continuous process and I have no doubt that in 20 years time if we come back the standards we employ will be better again that they are at the moment because expectations in society actually dictate that. So, we have seen some step changes but I think, in terms of animal welfare, we're actually on a continuous path to get that level of improvements for all animals and animal products sold within certainly the EU and, hopefully, on a world-wide basis.

We need to be very careful to distinguish, in the current debate, between concerns to do with the production of animals and all that flows from BSE and food-and-mouth and a whole variety of other issues which are going to make a radical difference to the way in which we actually produce animals. But the reason that that difference will compound is not to do with animal welfare per se, it is to do with the fact that it's mostly to do with food safety. And I think we're doing ourselves a disservice if we suddenly say 'right we will go for big changes in animal welfare', it is opportunism in that sense and it's being done for the wrong reason. So, I think what we need, my own personal view and as I say I'd like a reaction, we can have minimum standards and those will be communicated to consumers and they ought to be able to feel comfortable with that. If they are then concerned consumers, beyond that, who wish to express a preference for even higher welfare systems, what they need is accurate labelling and accurate descriptions so that they get for them what they expect to get. For example, we've already seen European action in terms of a common definition of organic production. We could easily see the same definition for free-range or 'outdoors' or whichever word we care to use so that people can be clear that when that description goes on it's telling them something about

the product. But to then take it down to all other levels of production I think is unnecessary, but I welcome other views.

Federation of Swedish Farmers: I want to quote a very interesting sociologist, Fischler, what he says is it is irrational to consider the public to be irrational. The perceived risk is as important as the real. I think there is a common sense in the public from time to time. Personally, I think it's wise to see the connection between animal welfare and food safety because it's integrated. Healthy animals are really the platform for animal welfare. You can't be a happy animal if you're not healthy and a healthy animal has a healthy environment. Good management is dependent on it. In another way, you can use antibiotics to cover up bad management, that's why I think there's a clear connection between animal welfare, animal health and food safety. And you should look at it as integrated, as the Commission does, and I'm very pleased about that because the thing that is true in Sweden is that when we stopped the general use of antibiotics for pigs and poultry we had to improve the environment for all poultry and pigs, meaning you improve animal welfare and have healthy, happy animals and high level food safety because you all know the risk of misuse of the antibiotics for persistent bacteria. So, there is the connection I would like to point out that there is I think common sense in the public that for some irrational is in a way rational. I think we must be very much aware of doing the wrong thing if you consider the public or consumer to be irrational.

Sonja van Tichelen, Eurogroup for Animal Welfare: I and my colleague here have been involved in this project from the beginning and I first of all want to thank the organisers for putting on this research. My first point is really that I'm surprised there hasn't been similar research done before by the industry, although there has been some research done by us about animal welfare on specific issues. But such a wide project and covering so many countries, I think it's the first time. This leads me to the point, that I don't think in any other production system, cars or any other product, the consumer is so ignored as in farming. And I think the reason is because it's such a heavily subsidised business. The consumer doesn't know how it's produced so they just buy what is in the shop. I think that has been shown and they don't want to be responsible and I agree that I don't want to be responsible, I just want to have safe, animal welfare friendly products in the shop. That's why I think that legislation is so important and that's what we are working on. Now another point was raised about welfare standards and legislation here. I would think that EU standards are based on welfare and we have to fight very very hard to have good welfare standards in our legislation. So, we are against an industry which I think is not considering welfare, as such, because we have to fight every inch and Mr Gavinelli and others here will confirm that. For every centimetre, for every measure we have to fight. I don't think the farmer can say we will consider the welfare of the animals if you put a hen in a battery cage. I don't call that a consideration for the animal's welfare at all. I'm very surprised about the strategy on quality assurance schemes because I feel that there is a future for them. Maybe the reason is because there's so much distrust at this moment and wrong information. I think labelling has a role to play but first of all we have to make sure that everything which is in place is honest because there is so much misleading information that consumers distrust labels and the actual quality assurance schemes which

are in place. That's one thing I want to tell the organisers because I think, for us, it's a great tool of information and I hope, also, for the Commission. Thank you.

Mary-Anne Bartlett, Compassion in World Farming: There's been quite a lot of mention of labelling and I don't know if anybody's proposing to include on the label the length of journey that the animal has had to travel before it's been slaughtered. It's one of the biggest problems in the EU and outside that long-distance transport is portrayed as causing suffering on a large scale. We noticed that the public were very concerned when they realised because of the foot-and-mouth disease outbreak just how long animals do have to travel. I think they hadn't really been aware of it before then, so I feel surely this is another consumer concern. I would just point out something that Mr Gavinelli referred to, that Ireland has the highest livestock shipping standards in the world. I would just point out in case people think that means we also have good welfare protection for those animals but sadly there are absolutely terrible appalling problems in that trade showing that no matter how good the legislation is it doesn't always solve problems. Some trades should actually simply be banned.

John Don, Farm Animal Welfare Council, UK: I think, Mr Chairman, that those who really care for their animals might leave this conference sadly disappointed because one of the key issues that has come out of this is the low rating animal welfare has in consumer concern because food safety is the overriding factor. On the other hand, I think one can take great hope from this conference because, as has come out from your research, animal welfare is considered, if not implicitly, explicitly considered, as a major indicator in terms of food safety. And I think this gives us all a sound base to strive to reach what are acceptable standards to these terms for animal production. So, I would consider more hope. However, I do take issue with you, Mr Chairman, because you say it's either going to be the experts or the politicians who are going to set the agenda. I think there is a middle way where consumers' interests, producers' interests, retailers' interests can get together and that is through the quality assurance schemes. What we haven't mentioned today and what I think is an absolute key to these quality assurance schemes we've mentioned is the mistrust there is in the consumer's mind. They do need to be proved that they're properly audited and thoroughly audited. And if that message can get through into the consumers then I believe this middle way is much more acceptable because it evolves according to market determinations. And I think that's a better way of doing it that actually improves our animals' welfare on all of our farms and I think that's my major concern. However, I would add one proviso, that I see as a key issue in this is how to get these standards accepted at each purchasing point, I come back to my original question.

Joachim Domeratzky, Vertretung des Landes Brandenburg: There seems to be a lot of enthusiasm emerging for labelling and I suppose on the face of it nobody could disagree that labelling was probably a good idea all things being equal, but I've been working in this area for the last number of years, on the quality assurance side and one has to take into account practicalities of trying to make a lot of this happen. When I think

of labelling, I think it's just something to bear in mind. People who know the sector as well as I think they've looked at the meat sector might not realise how complex it would be to ensure that this kind of labelling was put in place. Meat is bought and sold, it's processed it goes from A to B, it's broken down, it's cut up. The practicalities of putting in labelling that can be policed in some meaningful manner is very very cumbersome. And I would contend that, in a lot of cases, particularly in the meat sector, it is probably un-do-able, can't possibly do. There are a lot of quality assurance schemes in place around Europe, they're part and parcel of the modern commercial environment in which we all operate, they're driven by the consumers and by the retailers and so on. It would be a help, I think, if at some level, some sort of common denominator could be brought to bear on those schemes such that if there was a scheme in place in Britain, for example, or in Ireland, and it meets criteria laid down by the EU, or laid down at some official level then that scheme has a mutual acceptability across a number of states at the very minimum. I think that's something that some consideration should be given to, Mr Chairman. Thank you.

Gemma Harper, The University of Reading, UK: Thank you. Starting at the end with quality assurance schemes. Consumers are against the idea of them and the problem with them, certainly in the case of the UK, is that there is a plethora of the quality assurance schemes. When you look in detail at those schemes, as we found on a different project for MAFF, now DEFRA, evaluating their animal welfare policy, and you look at what these schemes actually say in terms of animal welfare, the majority of them are replications of the law. So, the codes of practice in the UK, which expand on legislation and go through the Houses of Parliament are in place. The majority of the quality assurance schemes (with few exceptions such as Freedom Food) are simply repeating what is already the legislation. So, from that perspective, it's quite difficult to understand what the motivation, in terms of animal welfare, is for producers to participate in the schemes that are simply replicating the law as it stands. The major difference that they make, is in terms of traceability and in terms of origin and this comes back to food safety issues. The animal welfare schemes that are in place are not simply about animal welfare, they are about food safety, and when they do talk about welfare, the majority of cases, they are not going much further beyond the legislation as it is in place. So that's one of the issues. The other issue is that there are simply so many of these schemes, the majority of which consumers don't know about. Most of it is legal anyway. They are not standardised, there are schemes for various different species and they mean different things.

The consumer doesn't really believe that there's a genuine interest in animal welfare and I think part of what we were discussing in terms of animal health need to be addressed as well. We're not suggesting that consumers define animal welfare simply in terms of animal health. They don't reduce animal welfare to animal health issues alone. Animal health is only part of animal welfare. It's more than that, it's about an issue of behaving naturally, it's about all these other natural issues that define consumers meaning when they talk about animal welfare. So, these schemes again aren't necessarily addressing those issues. They may be addressing animal health issues but they're not necessarily

addressing animal welfare issues. Consumers' perceptions of these schemes are that they're generally a marketing ploy. We show labels and consumers are saying to us that, not only in some cases do they have low recognition or awareness of what these logos are, many don't know what they mean and, even if they did know what they mean, they didn't believe that these were really assured in the way they'd want them to be. And this is quite important, consumers are quite savvy when it comes to understanding marketing strategy and they point out to us that there's a green field they realise that's just an image and that's what they use to sell the product and have no bearing at all in relationship to the way the product was produced.

In relation to that, consumers do want labelling and images on products to be real, they want it to reflect the way in which the product has been produced. They don't want to be duped, they don't like it. We examined the issue of farm fresh eggs and the whole confusion between farm fresh and barn fresh and free-range. When they begin to understand what is going on, their lack of trust increases. The quality assurance schemes are a potential but they need to be standardised, they need to be about animal welfare, not just food safety. And, if they're not going to go beyond legislation, they need to say why and really what's the point of having them in place in the first case? So I think that, for all these reasons, it's not a case of they're not useful, it's a case that many of them as they are now are not very useful and the consumers are saying, as they are now, they are not addressing their concerns.

Coming back to the issue of animal, there are various definitions of animal welfare and one is purely an animal health definition. That is an animal is in good health then that constitutes good animal welfare. Another one might be that that's just a component of it and animal welfare can't simply be reduced down to animal health. And from consumers' perspective, that's what they mean, they don't mean good animal health means necessarily good animal welfare. And it's also the case that they wouldn't believe that farmers were mistreating their animals, they don't think that makes any sense. They have a fairly sensible opinion about that, they don't think that farmers are cruel people by any stretch of the imagination, but some production systems are perceived to go against what animal welfare is, without just reducing it to animal health. There's a problem with communication and the problem of what the animal welfare standard is and the problem of what do the actual standards mean in terms of animal welfare. So we can have quite an active debate about what animal welfare is but, from the consumers' perspective, it's not just animal health.

Mara Miele, University of Pisa, Italy: Across the countries, labelling is considered very useful. It could provide the tools for improving information but I wouldn't guarantee that all the producers would stick to solid rules, especially animal welfare. How much legislation would be put in place to guarantee that, whatever you put in the organic definition, it cost the countries. I expect it's an enormous set of rules, which are common, there is a common regulation, there are common definitions. There's a common label farming policy to define something that's more specific. I think people are generally thinking as a reaction and a need to know what is on the labels is consistent.

And the information that they want to know is not only whether it's beef or pork, or the weight, which are the most common information, it's also from what kind of production it comes from. It might be difficult, but I think definitely not un-do-able and there are examples, across the countries, especially about labelling.

Audience member: We're talking about health concerns. The consumer has a lot of health concerns. Is there real indication or real proof that our food, which is presently produced in Europe, is really unsafe, is unhealthy? Who gave the consumer the perception that food is unsafe and, in this connection, is also the discussion about labelling where we are opening a can of worms. What does it have to say on all these labels? And if you think of mixed products, for instance, and that was described already, it would be very very difficult to give a real good description of this label. And another question perhaps has to be brought forward, the consumer thinks he has concerns but if the consumer is supposed to be asked if he is prepared to pay for it, not only in terms of money, but is he prepared to pay for the animals. I think that the only base for future debate is how we can improve the welfare. One of the most important places in terms of the site of these emotional things, I think and I feel, is the scientific welfare based on facts that can fuel, so to speak, legislation, and that also gives arguments to informed ethical discussion. So that is my question why are we talking about unhealthy food?

John Bruton: I would just like to point out there is a legal requirement in labelling in the cases of foods that are mixed. Increasingly people want convenience foods. Someone told me that in a typical chicken Kiev, that you buy, there could be meat from 41 different countries in one chicken Kiev. Now the label would have to be a very large label to cover all the relevant directives or the ingredients, to the extent that there are animal ingredients, including animal fats, for example, in chicken Kiev. So I think there is a tendency here to focus as if the only food we have is beef and chicken and things like that. In fact, we're eating increasingly processed foods, which is an entirely different type of product with an entirely different set of problems as far as either labelling or quality assurance is concerned. And, if we're importing ingredients to go into foods that you're processing here, to what extent do you have control over the welfare and creation of those ingredients from other countries?

Peter Vingerling: I will answer the questions very simply, in fact, the industry itself is responsible for the image that they create to the public. The industry itself is responsible for scandals like dioxin or BSE. The Governments are helping them sometimes to hide by not giving the proper information or trying to water down like there is no such thing. Then gradually, from the defending point they are giving step by step for their position, they refuel the scandal. So, they don't trust the information of the industry if 10 years later, although we have legalisation and it's no longer allowed to use this kind of food to give to your cattle, we still have English food coming in to the country and we still run the risk that you are feeding your cattle an unwanted product. How is that possible, where is the enforcement, where are the Governments who have to look after the rules? It was already in discussion; the Chairman mentioned it, we all have our individual thresholds of morality, so I can say to myself do I want to be a bullfighter?

Do I want to kill this dog that I don't want any longer to be in my possession because it's wild? And on top of that do we want bullfighting as a phenomenon in our society? Or, do we really want to kill our male chicks one-day-old because we cannot use them to lay an egg for us? Now, this is reflected in the action of politicians in our administration and, I have to say that, in the past the agricultural lobby was powerful and very dominant in the process. So, what you can see is there is the reflection of that same trait, the economic position of individual countries reflects in the way they behave when making legislation in Europe. So, as a result of that, the scandals we're looking at, at the moment, are far away from what should be done if they don't reflect scientific data that we have. They're not reflecting scientific data at all. They're just a compromise between what is feasible or our competition with other countries. And what's good for the animal? The animal's welfare that you see in those situations has not been raised since the 50's. It's the animal who has to pay part of the price and not the consumer. Now having said that, the consumer has the image of natural, already set, natural issues. Maybe they cannot define what animal welfare is all about exactly and maybe they cannot say precisely what they mean. If you say 'do you really want an animal that has been confined in this cage and has this behaviour and cannot move for that behaviour?' they'll all say no. So, the question is what price do we want to pay for better animal welfare?

Now here is the Government again as the promoter of the way forward. I think that our Governments should guide our behaviour. When I go into a petrol station I want to use some petrol in my car, I buy de-leaded petrol because it's cheaper than leaded petrol although the process to make it is more expensive. Why? Because the Government has subsidised it, via taxes, and is creating a situation in which the wanted behaviour of the public is steered in a good direction. So, here is something for our Governments as well. Then you see what they say and what they do and the price difference is not so huge as it is now because it is the alternatives who are paying the price for, let's say, all the investments we have done in the intensive farming systems till now. The only difference that the change of the present subsidies into a direction where we can compete on quality is only going forward is because we know already, and industry itself has found out, that we cannot compete on the world market on cost price. We have to change if we want to stay alive in the future. It's short sighted to say 'hey guys we have to feed the world', no we don't have to feed the world, at least we have to feed Europe, and maybe there is some margin for some world export but we don't have to feed the world for the whole market. It's the Americans that will do that or South Americans or the Chinese or whatever. So, if we're coming to the WTO we have to stand for our values, we have to stand for the values of our society, we do not accept child labour, we do not accept suffering of animals. And if there is a price to be paid then yes maybe but let's get the money from the subsidies that we are giving now to intensive farming systems because that is the largest expenditure of the European Union every year. Let's give the money from that to the welfare systems.

Mara Miele, University of Pisa, Italy: I want to go back to the question. First of all, whether there is a health concern in food consumption in Europe. Now there's previous research that says that health concern is really affecting consumers. It's the

measure of forces, which are informing changes in consumption. An ancillary question is that for health concerns, people are moving from red meat to white meat. They're moving to white meat because it is perceived as better for a healthy diet, a diet which won't have an effect on level of cholesterol, it won't have an impact on heart disease and things so forth. So when we talk about health concern, we think about consumers selecting items, available on the market, because they are thinking about a healthy diet. Some would promote a better diet, a better quality of life, a better style of eating, which would prevent diseases, would increase energy, well-being and all sorts of things. These are the discourse about food safety. What is present at the moment, is an evident lack of trust and a growing concern about food safety and this is related to products, which come from intensive farming systems. Why? There is evidence, during the last 10 years, that all the food scandals, which happened in Europe, come from intensive farming systems. The scale of these disruptions has been enormous and the media coverage has been enormous. So, on the one hand, there is a health concern, which is coming more in industrialised countries, rich countries where you don't have to deal anymore with food security issues, people start to shop selectively for meat consumption that's more healthy. In the United States, for example, health claims are allowed and beef producers can say this is all grass beef and it's healthier for you because it's less fat and cholesterol in your blood. In Europe, this kind of health claim is not allowed and it will be a long discussion why they are not allowed. But the real point, I think, which is closer to the concerns about animal welfare, is the growing concern about safety and, in the consumer's mind, the higher the animal welfare, the safer the product. Now, you can say, from a scientific point of view you can have an intensive system which is safer than a less intensive system. That is not what is driving consumers' perception. It is not what is in the consumers' mind when they think about the products that are on the market. And they can't tell them apart at the moment. That's all about the issue about labelling.

John Bruton: I'm not sure that will be accepted by everybody that all the food scandals have arisen from intensive agriculture. Certainly I think there is argument that the foot-and-mouth wasn't necessarily caused by intensive production. Foot-and-mouth, as we know, is endemic in certain parts of the world where livestock production is extensive.

Mara Miele, University of Pisa, Italy: I am happy to raise this issue because foot-and-mouth, unfortunately, is a bad example because the whole market is affected. From an animal welfare perspective, how could you justify the slaughter of masses of animals that were in the market?

John Bruton: That's not the point I was making though. I don't think it is proven that all animal welfare problems ...

Mara Miele, University of Pisa, Italy: Over the last 10 years I think the major food scandals come from intensive farming.

John Bruton: Not all, probably some major ones, but not all of them.

Andrea Gavinelli, European Commission: As you know, I work in the area of animal health and welfare, so with the foot-and-mouth business I can just put on the table a clear statement of what it means for public involvement. I think the Commission is saying why are we not vaccinating all of the animals, and the public is looking for policies. It's true that the ideal Government policies are not so easy to be effective in emotional matters. Policy against vaccination was initially a pragmatic approach to disease control. For a conference in September here in Brussels, I collected many thoughts during the debate, and I just want to put on the table what I think just to see if I'm missing something. What I understood is that the research is useful but we need to understand how the things are. What continue to worry the consumers are food scares that are happening in the media, one by one, during the last year. I don't know, but maybe there will be other food scares in the future as a result of global warming or something like that. The second thing is that, in many cases, legislation is something that's important for everybody in Europe. Then we have number three - we need to investigate the relationship between animal welfare and food safety because we're thinking about these relationships from different perspectives, but we are always following animal health in the end. Fourthly, we need to investigate the necessity of labelling in practical terms and, in particular, internationally. Internationally, it means which nations have to approve labelling and to apply labelling. These are four elements that I want to just deal with very briefly. I wanted to gain a dynamic reaction on our assumption and thoughts on animal welfare that are related to the other big things that we discuss today, which is the political attitude between man and animals. And, just to conclude, it was one of the best days in my last 6 months when I could say that the Minister of Agriculture, of the Union, had a meeting in May, with the Council of Ministers, and the issue was animal welfare, ethics and animal husbandry was discussed. Because my experience of the last five years was that there wasn't so much. Normally, I've seen the minister discussing prices, restitution and wine. It was the most enormous challenge for 15 years to discuss ethics and animal welfare, and we spoke for 2 1/2 hours and, effectively, it was a public debate and it was a debate with conclusions. But, in general, it was about prices and the position of the Americans with policies .

Adolfo Sansolini, LAV, Italy: If we ask a question, even the most general thing, 'what is the most important in your life?' we would get the same replies: health, having enough money, which doesn't mean that other things are not important. If people don't say animal welfare, they're not saying, if I understand well, we'll support intensive farming or the killing of animals. And, if they ask the general question, 'what is most important in your life?', okay, health, money and so on, and you ask a second question 'what if someone's in your neighbour's home and kills them, are you in favour or against?', they're against, the majority of people are against. What's more important: your wage or their life? Possibly, they will even change their priorities but they wouldn't think about their life or their neighbours' compared to their daily experience of health, money, very simple before other things. So, the public perception is something that came out from the second question, which was very clear when they had to choose between intensive or extensive methods, people were totally against intensive farming. They were totally endorsing a position in favour of animal welfare and yet animal welfare is very

clear not just about health. Health is not welfare, it can be, but I think that most of us, including farmers, would prefer to have a leg taken away but be free to walk than being in perfect health in a cage for a whole life. Health in that case is not welfare. Welfare is something wider, it's freedom to perform the natural behaviour as much as possible. So, I don't think that keeping someone alive, without a code, is something that we can define as something that can satisfy the need for welfare. And it's something that the industry knows very well because the industry knows that consumers consider factory farming as something that's not acceptable, otherwise I would not understand why we see pictures of cows that smiles and not see them in a crate. I never saw an egg box showing a cage, but always smiling hens and I never saw a hen smiling like on a battery eggs box. So it's clear that the industry knows perfectly well, that people wouldn't consider something to eat if they knew they were coming from factory farming, otherwise they wouldn't spend millions of Euros to promote their products, lying showing happy animals outdoors. I think that there is a strong demand for animal products; we have to consider the general communication where we spend a lot of European Union money to promote meat and fish consumption and people are, therefore, obliged to think that eating meat is indispensable, which is quite crazy.

Institutions against cancer, for instance, all over the world are promoting a plant based diet, or at least to decrease the consumption of meat, if not to eliminate it at all. It's quite strange that we're still promoting meat and we're having to ask ourselves if people are ready to pay more today, because if this is the consideration we must bring in that issue this morning. We must consider that, inside this room, the vast majority of us is actively supporting child labour because I'm sure that we all have something made in Indonesia, in Pakistan, in India, or wherever, that has been using child labour or has been denied the rights to the workers to live the way we want to live. So do we have a right to comment on what is healthier for animals and consumers as not so important, with not as much as meaning. We got to a point in Italy, having a vegetarian minister of public health, who was in charge of the animal issues, who couldn't say during all the foot-and-mouth crisis that he was vegetarian but he had to make statements ensuring people that they could eat meat because it was safe, because it was controlled. And he was asked by the Council of Ministers not to talk too much his being a vegetarian doctor. So, we have to consider that, if we spend part of the money that I'm spending as a vegetarian to support intensive farming because people aren't prepared even to pay for intensive farmed meat, I'm paying for their meat with my taxes and I don't know why. We should understand that if people want to eat meat, to pay for their meals, that anybody can also choose to take away money from less healthy meat or less animal friendly meat, if there is any animal friendly meat, to spend that money to improve the intensive farming. Thank you.

Mara Miele, University of Pisa, Italy: Yes, I think we all agree that animal welfare, as we said in Sweden, is taking animals from the natural behaviour, I think we all agree on that. We must be honest; the spreading of foot-and-mouth is an effect of large-scale production trading of animals. If you deny that, that is not true. And, of course, large scale production, large scale feed production, means a problem of dioxin, spreading to a lot of farms, to a lot of animals, and you must be aware that our large scale production

means that you have to assist them to minimise risks. It's a great responsibility and the trade in animals is an effect of specialisation in some countries and we have animals from other countries spreading the disease. So, it is an effect of animal specialisation and large-scale production. I think we must be honest and say so.

John Bruton: Large scale trading is different from intensive production. Yes, certainly trading has been going on for centuries but it is more intensive now as per foot-and-mouth. The point I'm trying to make is I think there is a risk in assuming that it's the intensity, as distinct from the extent of the trading. Most extreme cruelty to animals can occur on a very traditional peasant type farm where you had no technology. These forms of cruelty are not confined to any one type of production system.

Peter Vingerling: I agree with you when you say this is partly a trade issue but it's also an issue of structure. You can reduce your risk you are running by one to one relations or by saying an animal can only be moved once in its lifetime. The fact that we've got foot-and-mouth disease in the Netherlands was because of the trade. So trade makes it possible. And the structure of the present industry is that there are so many movements of a short distance that once it is discovered it is spreading fairly rapidly and many many animals are involved. And the third thing is because of the fact that there is no vaccination for it at this moment, it means that you cannot protect a corridor around the area that is infected and give yourself some time to overcome the problems. So it's going on and on as is shown in the UK where they are still suffering from the disease. It's a tragedy for farmers and for animals. And this affects the whole country and the whole countryside. So we have to do something about that issue at least. And, if I make one more remark on what was presented today, if I make a combination of all the figures I should pay a tribute to the Italian male, not only have you got in the discussion here but if I heard correctly Italians were more or less equal in the reduction of the consumption, as some other countries, but the males there were the only males who reduced their meat consumption more than females. So that might be a compliment and it wasn't there a couple of years ago, so we make progress.

Cath Milne, Scottish Agricultural College, Scotland: I wanted to return to part of an original question. First of all, I'd like to congratulate the team on the brilliant work that's been done. But it seems really that the fundamental issue is that, if we are seeing animal welfare standards currently not acceptable in parts of the industry and we want to raise those standards, there's a cost associated with that. And, ultimately, that cost has to be borne by somebody. And the real issue, surely, is the consumer willing to pay for that and if she's not, as apparent in the current situation, who is? That then has to go through the Government, either by subsidies or something similar. But if you put a tax on, then all that will happen is it will reduce the competitiveness state of our farmers and, ultimately, that won't aid animal welfare because it will increase the supply of imports and decrease our home production. So I'd like some comment on how they would have that balance between whom pays to improve animal welfare standards?

Gemma Harper, The University of Reading, UK: I think that point separates animal welfare as an issue from other issues, that have been mentioned, such as, homosexuality, age of consent, child labour, there's a whole series of ethical issues that society needs to make decisions about, whether or not we have that decision made into law. The difference with animal welfare, as an issue, is that somebody has to pay for it in the end and consumers are demanding these changes, they want improved methods but, at the same time, don't want to pay for it. I will take issue with the point that people won't accept poorer standards, they do now and they do eat it, and the majority of them are educated and the consumers know that. That doesn't mean they don't want changes to be made, they do. The point about child labour is also true, we all participate in all these different kinds of systems that we ethically do not agree with. When it comes down to farm animal welfare, somebody does have to pay at the end of the day. The consumers are not willing to pay for this important issue. Research has been conducted on willingness to pay and the majority of consumers say they are willing to pay, but they don't, even though they say they would be willing to pay 10% more depending on the product. So, if the basic cost is cheaper than they would want that product. If it's a more expensive product, they don't. But, again, willingness to pay is a measure of what consumers say that they would like to do, but it's not actually a reflection of what they actually do because, coming back to the issue of what these figures reflect, they reflect what consumers think they do and what they think they'd like to do. They don't pay for what they want in terms of animal welfare. So, it comes back to the ethics of this issue.

This is the data we've got and, based on the data, we know that consumers are very concerned and, at the same time, we know that consumers aren't concerned enough to do anything about it. So, the question then becomes, as a society, are other people concerned and do they want to have that decision taken out of their hands and make it an issue that we all pay for. I think that's what it comes down to. Consumers have the option to pay for higher welfare standards but they choose to buy products that, in many cases, if they thought about it, they'd know that it's from an intensive system. And these aren't systems that they ethically approve of but it doesn't stop them participating in the continuation of these systems. So, we now try to think about what can be done, in terms of animal welfare. At the ethical level, we no longer talk about consumers, consumers aren't going to pay for it, they've already shown that they're not going to pay for it, they've told us. They raise all these strategies, the psychological and behavioural strategies, which prevent them from having to make that decision, which prevent them having to think about it in the first place. So, on a basis of the data that we have, if changes are to be made for ethical reasons for animal welfare, they're not going to be made because either consumers are concerned or that they state they are willing to pay more. In reality, consumers go to great lengths to avoid being faced with such a decision.

Audience member: Thank you, Mr Chairman, for giving me the floor, I'll be very short. We were talking about food safety and health. Food-and-mouth disease and, for example, swine fever are infectious diseases, they don't affect the food quality. If you are not a pig you can't get swine fever. So, that means that is a welfare issue because these animals are slaughtered because of legal regulations. So, we have a difference here

between different areas. There are infectious diseases, which affect the health of the animals, and they are killed. And that is an ethical issue. The second point I want to make the animals we are talking about today are farm animals so the reason they are living is economy. I would just like you to keep in mind of that. When we're talking about welfare, welfare should not only be a matter of NGO campaigns; welfare is for the animals concerned and that means that we must give evidence with scientific background. And my basic question is do you think that our food today is unhealthier or unsafer than 50 years ago? Thank you.

Mara Miele, University of Pisa, Italy: Well I don't think we can only express our opinion. What we were reporting is what would consumers think. The people we've been talking to are the people who we've been interviewing. What we think in terms of whether it's healthier or safer I think is irrelevant. We're just single consumers here. From the research that we've done, what we can say is there are signs that there is growing concern about food safety and health issues, which forms part of consumer concern about animal welfare.

Panel member: If I may, I owe it to the audience just to make a few corrections. I heard a couple of inaccuracies. A gentleman here was talking about food safety scandals under that big label foot-and-mouth, but it is not a food safety scandal from our point of view. A second inaccuracy in information was given in relation to intensive producing systems for hens and pigs. And those are two, unfortunately, are not pure CAP sectors as we know them in Europe. I don't think I want to go into this CAP cost too much, as with many other common policies probably the percentage of money to agriculture would be proportionally much smaller. We, globally, are very much in favour of the Commissioners' submission to the WTO as far as animal welfare is concerned. I think the European Commissioners, the European legislators, strongly try to preserve the system and we know because we'll have feedback. It's extremely difficult to defend the ideas that we're developing. Far from animal health, we're talking about human health as far as our concerns and our preoccupations are concerned. I think we just have to be realistic, also in terms of the international system. Globally, we could be up in front. And last, but not least, I'm not sure I understood correctly but to my knowledge the non-vaccination policy is a global policy, but vaccination is possible if the subject is decided scientifically, and is implemented by the politicians. I hope I wasn't misunderstood what I said before but to my knowledge non-vaccination policy is a policy which is allowed under certain circumstances.

Gemma Harper, The University of Reading, UK: I'd just like to say thank you again for coming in all these difficult circumstances. The symposium, as of last night, has far exceeded my expectation of what I thought it might turn out to be and I'm very grateful for all of your contributions and participation in this, and I would like to encourage you all to stay in contact with me to provide feedback and comments. You will see the report, which will basically be the proceedings from today, and you'll be able to feed into the final report. So any suggestions, specifically strategy-related suggestions would be welcomed. So, that's a point we're still trying to figure out: what's the best way to

proceed in terms of recommendations. I think just to conclude and summarise what we found from the project, I don't want to misrepresent and say consumers aren't concerned about animal welfare when they clearly are. What they mean by animal welfare is something that's more complicated and the relationship amongst animal welfare and food safety and quality and the healthiness of the food is undeniable - it's integrated and it makes sense to consumers and perhaps it makes sense scientifically. That we don't necessarily know, but all our work has been about is reporting the perceptions of the consumer in terms of concerns and food choice. We have very high levels of reported concern, we have intense lobbying from the consumers themselves of the Commission and the UK Government on this subject more than any other issue. We have this level of concern and we must take it into consideration and realise that consumers want something done about animal welfare standards. Our problem is that consumers do not want to accept individual responsibility for it, they do not want to pay for it individually and, ultimately, they want legislative approach. We need to figure out if that is something that's workable, is that something that's practical? Given what we know about international trade, about WTO rules, about all the other factors that have an impact on EU standards and have an impact on sales of products, at the end of the day, we need to figure out what can be done to address consumer concerns, in light of all those factors.

At one level, as already stated, consumers are concerned but they're not concerned enough. Where they are very concerned about the relationship to health they follow through and purchase organic products, indeed the UK imports 70% of organic produce to meet the demand for products that are perceived to be healthier. We don't have at the point of purchase the same kind of translation of beliefs and concerns into behaviour when it comes to animal welfare. And where we do see expressed concern about animal welfare, we also see it as an indicator of the health, quality and safety characteristics. It's not simply about the wellbeing of the animals. So I hope that we've been able to share with you, and reflect with you, on the results of this project and it's not over yet. We want to proceed to some sort of conclusion when we can make recommendations to the EU that do reflect consumer concerns but do so in a practical, workable way that we come to some sort of consensus and not simply continue to, if you like, repeat the debate that has become polarised between the market decision or the legislative decision. We need to move forward with the next round of WTO approaching and it becomes even more imperative that we reach some workable position. From our perspective, we do want to honour what the consumers have said to us to a degree, where it could be workable, but also, at the end of the day, these are perceptions and, if we're going to move forward, the first step is to understand those perceptions and to devise strategies which are able to address consumer concerns, whether that means correcting misinformed perceptions or providing solutions to concerns which arise from informed perceptions. We hope this project goes some way to advancing this issue. Thank you very much.

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