



FARM ANIMAL WELFARE: WHAT CONSUMERS WANT

A survey of Europeans' understanding and expectations





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Absolute Agency designed this report and the visuals associated with this survey.



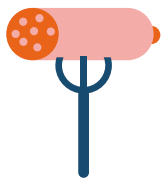
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¹Gathering five national consumer organisations and giving voice to a total of more than 1,5 million people in Italy, Belgium, Spain, Portugal and Brazil, Euroconsumers is the world's leading consumer cluster in innovative information, personalised services and defence of consumer rights. Its European member organisations are part of the umbrella network of BEUC, the European Consumer Organisation. Together they advocate for EU policies that benefit consumers in their daily lives.

IN A NUTSHELL



The overwhelming majority of Europeans eat meat, but most of them say they do not eat it every day.



If the price of meat increased (for whatever reason) consumers would primarily react by buying cheaper types of meat and cuts and reducing their meat consumption.

Consumers want more information on animal welfare. **Three quarters** of respondents agree with providing method-of-production labelling on all animal products, not just eggs as is currently the case.



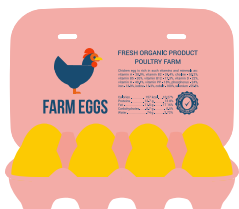
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Animal welfare is an important issue for a very large majority of consumers. **Around 9 in 10** consider important the implementation of new laws to improve the welfare of farmed animals such as providing more living space, banning cage systems, and mutilations.



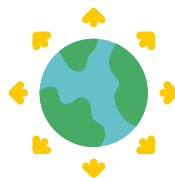
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7 in 10 consumers say that they are willing to pay more for food which is produced to higher welfare standards, although to a varying extent. Of those willing to pay more, half of them are only ready to pay up to 5% more, **30%** are willing to pay up to 10% more, **12%** are willing to pay up to 20% more and **8%** are willing to pay more than 20% more. At the same time, around **17%** say that they currently have serious difficulties dealing with the cost of meat.



Still, method-of-production labelling for eggs could be improved as most consumers have either not noticed it (**22%**) or do not understand such labels (**33%**).

Consumers agree (**76%**) that animal food imports should be subject to the same welfare rules as those produced in the EU while a strong majority (**74%**) would like the EU to financially support farmers to apply higher animal welfare practices.



53%

Half of consumers support the best possible welfare for farmed animals even if that implies paying more for animal products (**53%** agreed, **18%** disagreed, and **29%** has no opinion).

Over half of consumers surveyed said that animal welfare has some influence on their purchasing choices for most meat categories.



Yet current levels of knowledge of animal welfare practices are generally low across EU Member States.

At the same time, **less than a quarter** of respondents said they have high or complete trust in animal welfare claims.

23%



The European Commission must prioritise the publication of the revision of EU animal welfare legislation in line with consumer expectations and scientific evidence.

WHY THIS SURVEY?

Animal welfare has a high level of interest and support from EU citizens. Over the years, Eurobarometer surveys on the subject have consistently demonstrated that animal welfare is an issue of great importance for EU consumers and increasingly, public pressure has mounted for improvements to current standards. In recent years, the many successful European Citizens Initiatives (ECIs) on animal welfare topics confirm its importance to EU consumers. For example, the recent 'End the Cage Age' ECI, which called for the prohibition of the use of cages for farmed animals, managed to gather 1.4 million signatures in just one year.²

In May 2020 the European Commission announced, as part of the Farm to Fork Strategy, that there was an urgent need to improve animal welfare and committed to revising the EU's animal welfare legislation by the end of 2023, to align it with the latest scientific evidence. In 2021, the Commission's official response to the 'End the Cage Age' confirmed its intention to propose legislation to finally prohibit the use of cages for certain farm animal species in the EU.³

In 2022, the results of the Commission's 'Fitness Check' on current animal

welfare rules concluded that there is still an inadequate level of animal welfare in the EU.⁴ Moreover, this evaluation recognised that in the absence of updates to EU legislation, some Member States had been led to introduce their own national measures. For example, while the culling of male chicks after birth is permitted and is common practice in most EU countries, some have moved forward and introduced bans on this practice in their territories or have committed to doing so. While this creates an uneven level of animal welfare across EU Member States, the differences between countries are further aggravated by varying levels of enforcement.

As part of its work to prepare a revision of the EU's animal welfare legislation, the European Commission asked the European Food Safety Authority (EFSA)

In recent years, the many successful European Citizens Initiatives (ECIs) on animal welfare topics confirm its importance to EU consumers.



Which EU laws on farm animal welfare are up for review?

The Commission planned to revise the following pieces of legislation: the Directive on the protection of animals kept for farming purposes, four Directives laying down minimum standards for the protection of laying hens, broilers, pigs and calves; and the Regulations on the protection of animals at the time of killing and during transport. To date, only the latter has been published.

to undertake several scientific opinions on the welfare of different farmed animals. The conclusions of these opinions show that, even though the EU is widely considered to have some of the highest global standards, some significant improvements are still required for the welfare of farmed animals.

In spite of its commitments to come forward with a comprehensive overhaul of the EU animal welfare legislation by the end of 2023, including a phase-out of cages for farmed animals, the Commission has, to date, only introduced a small part of the originally foreseen package of proposals.

While a revision of rules on the transport of animals was published in December 2023, the planned proposals on animal welfare at farm level; animal welfare at the time of killing; and the voluntary European label for animal welfare have not been published. It now appears likely that it will be up to the next Commission to proceed with during its new mandate.

The BEUC survey seeks to further explore consumers' meat and fish consumption habits, their attitudes to animal welfare including their desire for improved laws for farmed animals, their willingness to pay for better animal welfare as well as their interest and understanding of animal welfare labelling. We hope these findings can provide useful consumer insights for policymakers for the next legislative mandate.



²<https://www.endthecageage.eu/en/>

³Communication from the Commission on the European Citizens' Initiative (ECI) "End the Cage Age", C(2021) 4747 final.

⁴Commission Staff Working Document, Fitness Check of the EU Animal Welfare Legislation, Brussels, 4th October 2022.

METHODOLOGY

This survey is a joint effort between BEUC, ICRT (International Consumer Research and Testing), and Euroconsumers. The survey was done in November 2023 addressing consumers of 8 EU Member States (Belgium, Germany, Hungary, Italy, the Netherlands, Portugal, Spain and Sweden). An English questionnaire was elaborated then translated and adapted to the national contexts. Nine consumer organisations were involved: Altroconsumo (IT), Consumentenbond (NL), CECU (ES), DECO Proteste (PT), TestAcharts/TestAnkoop (BE), Organización de

Consumidores y Usuarios (ES), Sveriges Konsumenter (SE), Tudatos Vásárlók Egyesülete (HU) and Verbraucherzentrale Bundesverband (DE).

The data which was collected via an online questionnaire was analysed by Euroconsumers. Comprising 25 questions, it was administered to panels of around 1,000 respondents per country who were selected based on pre-defined interlocked quotas for age, gender and geographical location (according to the official statistics on the distribution of the

national general population). Samples were a-posteriori weighted for age, gender, educational level and region to be representative of the countries' national populations.

It is to note that surveys, such as this one, account limitations. In particular, we should consider the gap between people's intentions and declarations and how they would behave in reality. Nevertheless, the study provides valuable insights into consumers' preferences and attitudes.



MAIN TAKEAWAYS

Most consumers eat meat, but most of them say they do not eat it everyday

6 in 10 respondents report eating meat less than five days a week, our survey shows, while **18%** say they eat it daily. Very few consumers (**5%**) never eat meat (**2%** follow a vegetarian diet, **2%** a pescetarian diet, and **1%** a vegan diet). **11%** of respondents describe their diet as flexitarian – i.e. they eat meat occasionally.

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR DIET?



84% Omnivore
11% Flexitarian
2% Vegetarian
2% Pescetarian
1% Vegan

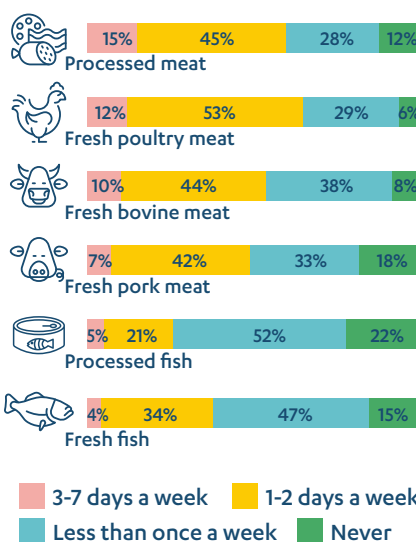
The highest frequencies of declared meat consumption are in Hungary, where **54%** of respondents say they eat meat at least five times a week (**31%** said they eat meat every day). The lowest frequencies of meat consumption are reported in Sweden and Germany where around **a third** of respondents say they eat it at least five days a week. In most

countries, males and younger people are those who eat meat more frequently.

While it is encouraging that most consumers report having turned away from a meat-heavy diet and say they do not consume it every day, actual consumption of meat in EU countries is often **2 to 4 times** higher than the recommended intake.⁵ The latest EU agricultural data shows that while per capita consumption of beef and pork products are expected to continue a (slight) downward trend, the per capita consumption of meat products overall has remained relatively stable for ten years – with even a slight increase from **65.8kg** per capita in 2013 to **67kg** in 2023.⁶

On average, poultry is the most frequently consumed type of meat, followed by processed meat (e.g. ham, sausages, burgers), beef and pork.

HOW FREQUENTLY DO YOU EAT EACH OF THE FOLLOWING TYPES OF FOOD?



Two thirds of respondents eat poultry every week (**17%** consume it at least three days a week). Portugal, Spain and Hungary have the highest frequencies of chicken consumption (between **74%** and **85%** of respondents saying they eat poultry every week). A significant proportion of respondents in these countries said that they ate it at least three days a week (up to **35%** in Portugal).

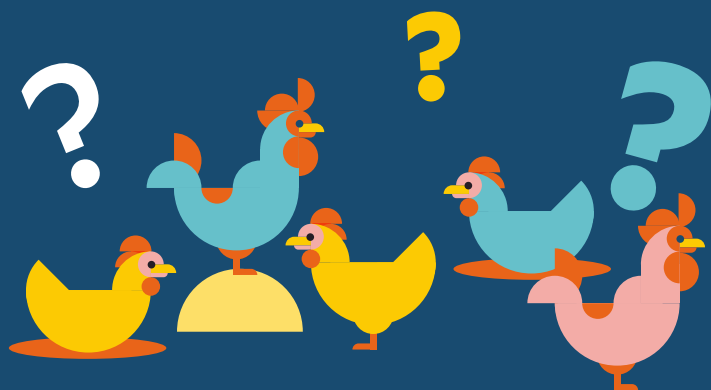
This is in line with EU agricultural data that shows that, while certain meat products such as beef are being consumed somewhat less by consumers, the continued high levels of overall meat consumption can be attributed to poultry (and mainly chicken) consumption which has significantly increased in the EU. In just over twenty years, per capita poultry meat consumption has increased by **50%** from **16.3 kg** in 2000 to a projected **24.6 kg** for 2024.⁷

⁵European Commission (2023). Drivers of food security. SWD(2023) 4 final.

⁶EC (2023), EU agricultural outlook for markets, 2023-2035. European Commission, DG Agriculture and Rural Development, Brussels.

⁷European Commission. Agri-Food Data Portal. (accessed on 4th January).

MAIN TAKEAWAYS



Is poultry really a better option?

Consumers are increasingly concerned about the impact of their diet on health and the planet – with **2 in 3** willing to change the way they eat for the environment, a previous BEUC survey found.⁸ Chicken is often perceived as a ‘healthier’ (leaner) meat and replacing the consumption of the most carbon-intensive animal products like beef with chicken may go some way to reduce GHG emissions. However, the continued expansion of intensive poultry farming has other serious implications, not just for animal welfare, but also for the environment and public health.⁹

Although organic and free-range chicken production has increased in many EU countries in recent years, it remains the case that the vast majority (around 90%) of chickens bred for consumption are kept in large intensive farming conditions. For example, farms with more than 5,000 broilers (chickens bred for meat consumption) represent only 1% of all broiler farms yet account for 93.5% of broilers.¹⁰

Such large-scale intensive farms are typically characterised by high stocking densities, birds bred to grow at rapid rates and indoor rearing. Not only does this have clear impacts on animal welfare but also bears risks for the environment and public health with intensive chicken farming being directly linked to water and air pollution as well as increased risk of zoonotic disease and the use of antimicrobials.

Following a request from the European Commission, EFSA published a scientific opinion for broiler welfare in February 2023. Its recommendations which include lower stocking densities, limiting the growth rate of the chickens as well as the end to mutilations (such as beak trimming) and cages are at odds with the practices of intensive farming.¹¹

After poultry, the second most frequently consumed type of meat is processed meat, with over half (**53%**) of the survey respondents saying they consume it every week (**19%** at least three days a week). Consumers in Hungary and Germany eat processed meat most often, with around **two thirds** of respondents in these countries eating it weekly. In Hungary, **4 in 10** consumers eat processed meat at least three days a week.

Human health concerns about processed meat consumption

The high consumption of processed meat by EU consumers poses issues not only for the welfare of animals raised for its production but also for human health. High consumption of processed meat is associated with increased risk of cardiovascular diseases, colorectal cancer and type 2 diabetes and it has been classified as carcinogenic by the World Health Organization’s International Agency for Research on Cancer.¹² A recent study investigating the health impacts of ‘ultra-processed food’ (UPF) consumption found that some UPF subgroups, and most notably animal-based products, were associated with increased risk of multimorbidity of cancer and cardiometabolic diseases.¹³ Food-based dietary guidelines, therefore, generally recommend limiting processed meat consumption to very low amounts.

1 in 4 consumers can easily afford meat but another fifth is struggling

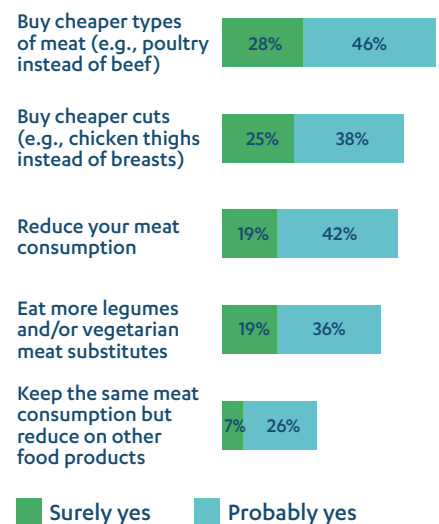
In recent years, as food inflation has spiked and the cost-of-living crisis persists across Europe, consumers are increasingly aware of and affected by food prices.¹⁴

A quarter (**24%**) of survey respondents say that they can easily afford meat but **17%** have serious difficulties buying meat. Dutch and German respondents were the most likely to report no difficulties to afford meat (in both countries **35%** of respondents can easily afford meat). Hungary, Portugal and Spain, on the other hand, had the highest level of respondents reporting serious difficulties purchasing meat (with **31%**, **22%** and **20%** respectively).

Amongst the different categories of animal products, consumers said that they had the most difficulties dealing with the expense of fresh fish (**4 in 10**) and fresh bovine meat (**just over a third**), while fewer consumers expressed finding it difficult to deal with the cost of the most consumed types of meat: fresh poultry and fresh pork (**around 1 in 5**) and processed meat (**13%**).

If the price of meat increased (for whatever reason), consumers say they would primarily buy cheaper types of meat (e.g. poultry rather than beef) (**74%**) and reduce their meat consumption (**61%**). **1 in 2** say they would eat more legumes and/or vegetarian meat substitutes, while **1 in 3** say they would continue eating the same amount of meat but would save on other food categories.

IF THE PRICE OF MEAT INCREASED, HOW LIKELY WOULD YOU DO THE FOLLOWING CHANGES TO SAVE MONEY?



⁸BEUC, One bite at a time: consumers and the transition to sustainable food, An analysis of a survey of European consumers on attitudes towards sustainable food, June 2020.

⁹Goran Gržinić, Agnieszka Piotrowicz-Cieślak, Agnieszka Klimkowicz-Pawlas, Rafał L. Górny, Anna Ławniczek-Wałczyk, Lidia Piechowicz, Ewa Olkowska, Marta Potrykus, Maciej Tankiewicz, Magdalena Krupka, Grzegorz Siebielec, Lidia Wolska, Intensive poultry farming: A review of the impact on the environment and human health, Science of The Total Environment, Volume 858, Part 3, 2023, 160014, ISSN 0048-9697, <https://doi.org/10.1016/j.scitotenv.2022.160014>.

¹⁰Eurostat database. Available at: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Archive:Meat_production_statistics (Accessed: 4th January 2024)

¹¹EFSA AHAW Panel (EFSA Panel on Animal Health and Animal Welfare), Nielsen SS, Alvarez J, Bicoût DJ, Calistri P, Canali E, Drewe JA, Garin-Bastuji B, Gonzales Rojas JL, Schmidt CG, Herskin M, Miranda Chueca MA, Padalino B, Pasquali P, Roberts HC, Spooler H, Stahl K, Velarde A, Viltrop A, Winckler C, Tiemann I, de Jong I, Gebhardt-Henrich SG, Keeling L, Riber AB, Ashe S, Candiani D, Garc  a Matas R, Hempen M, Mosbach-Schulz O, Rojo Gimeno C, Van der Stede Y, Vitali M, Bailly-Caumette E and Michel V, 2023. Scientific Opinion on the welfare of broilers on farm. EFSA Journal 2023;21(2):7788, 236 pp. <https://doi.org/10.2903/j.efsa.2023.7788>

¹²International Agency for Research on Cancer. Volume 114: Consumption of red meat and processed meat. IARC Working Group. Lyon; 6–13 September, 2015. IARC Monogr Eval Carcinog Risks Hum

¹³Chang K, Gunter MJ, Rauber F, Levy RB, Huybrechts I, Kliemann N, Millett C, and Vamosa EP. Ultra-processed food consumption, cancer risk and cancer mortality: a large-scale prospective analysis within the UK Biobank. The Lancet, volume 56, February 2023. Published: January 31, 2023, DOI: [https://www.thelancet.com/journals/eclinm/article/PIIS2589-5370\(23\)00017-2/fulltext](https://www.thelancet.com/journals/eclinm/article/PIIS2589-5370(23)00017-2/fulltext)

¹⁴<https://www.ipsos.com/en/29-europeans-say-they-are-currently-precarious-financial-situation>

MAIN TAKEAWAYS

Those who reported serious difficulties with affording meat were much more likely to say they would reduce their meat consumption than those with no difficulties, in the case that prices of meat would rise. **73%** of those currently struggling to afford meat would reduce their meat consumption.

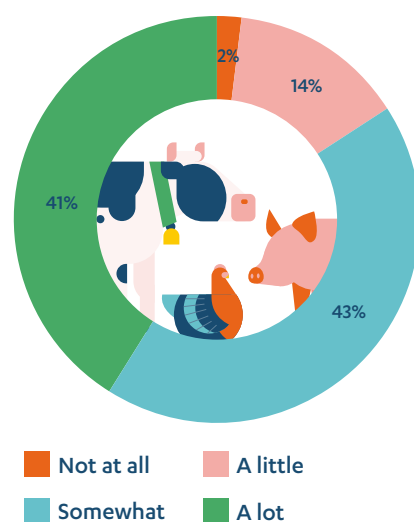
Consumers who eat meat everyday are twice as likely to say they would not reduce their meat consumption (**44%**) compared to those who eat it less than 3 days a week (**22%**). This disparity is the most pronounced in Belgium where those who eat meat every day are almost three times more likely to say that they would not reduce their meat consumption (**46%**) compared to those who eat it three times or less a week (16%).

In the event of an increase in meat prices, consumers in Southern European countries appear more likely to eat more legumes and reduce meat consumption whereas those in Central or Western European countries are slightly less willing to do so. And while just **over half** of consumers in Hungary and the Netherlands are willing to reduce their meat consumption in cases of meat price rises, in Portugal and Italy around **7 in 10** are willing to cut back.

The welfare of farmed animals is important to consumers

84% of respondents indicate that the welfare of farm animals matters to them (**41%** that it matters a lot). In all countries, this is more the case for women than for men.

TO WHAT EXTENT WOULD YOU SAY THAT THE WELFARE OF FARM ANIMALS MATTERS TO YOU?



Many consumers say that animal welfare influences their purchase choices – albeit to a varying extent depending on the products concerned. For instance, **6 in 10** on average indicate that animal welfare has some (**33%**) or a big (**27%**) influence when they buy fresh poultry meat. But when purchasing processed meat, slightly **less than half** of consumers say that animal welfare has some (**30%**) or a big (**17%**) influence on their buying choices.

Yet at the same time, nearly **one in two** consumers (**44%**) across the eight countries surveyed think that there are few options for animal welfare-friendly food in shops and supermarkets, with only **19%** disagreeing. This might reflect a gap between consumers' stated consideration of animal welfare when choosing animal products and the actual possibilities offered by the market.

However, it is interesting to note that this can vary between countries. **Over half** of respondents from Southern or Central European countries (Hungary, Portugal, Spain and Italy) appear to have difficulties to find such options in shops, while it appears to be easier for consumers from Western or Northern countries. In both the Netherlands and Sweden, only around **3 in 10** consumers said that there are few animal welfare-friendly options available in shops.

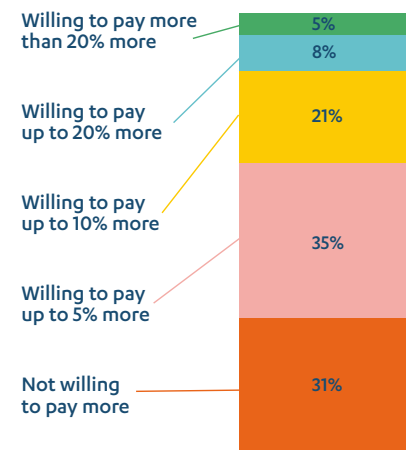
Finally, consumers also see something for themselves in improved animal welfare, with **71%** thinking that better animal welfare means safer food for people – which is indeed the case given the relationship between food safety and the welfare of animals.¹⁵ For example, higher animal welfare is correlated with a reduced use in antibiotics as the animals are less prone to infections. While overall sales of antibiotics, including those considered critically important for human medicine, have decreased in recent years, the introduction of higher animal welfare standards has the potential to further reduce the use of antibiotics in the livestock sector.

Consumers consider animal welfare to be important and most are willing to pay for it to some extent, although to varying degrees...

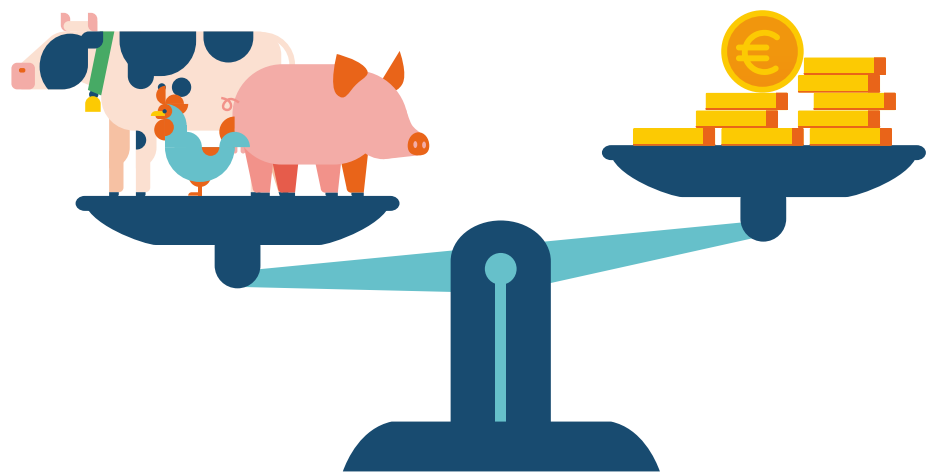
Most consumers believe that current standards are not good enough: **9 in 10** consider it important to implement new laws to improve the welfare of farmed animals such as providing more living space, banning cage systems and mutilations such as beak trimming or tail docking.

Italy and Portugal again showed the highest support for such improvements, with **96%** and **95%** of respondents in these countries expressing support. In four countries (Italy, Portugal, Germany and Spain) an absolute majority of people even said new laws were ‘very important’ to them. Hardly any consumers (less than **2%**) said that stricter laws were ‘not important at all’. This confirms a consistent trend, as demonstrated by Eurobarometer polls over the years, for broad consumer interest in better animal welfare standards¹⁶.

ARE YOU WILLING TO PAY MORE FOR FOOD THAT IS PRODUCED WITH HIGHER ANIMAL WELFARE STANDARDS THAN THOSE COMMONLY USED?



Our survey shows that slightly **more than a third (35%)** of respondents would be willing to pay up to 5% more for food which is produced with higher animal welfare standards. **One in five (21%)** would be willing to pay up to 10%



more, **8%** would be willing to pay up to 20% more. **One in twenty (5%)** would even pay more than 20% for such food. On the other hand, **one out of three (31%)** also indicated they would not be willing to pay anything more.

Consumers’ willingness to pay for food produced with higher animal welfare varies across countries. In four Member States (Sweden, Germany, Italy and Hungary), **over a third** of consumers indicated that they would be willing to pay more than 5% more for animal products from higher-welfare farming. But in Spain, Portugal, Belgium and the Netherlands, fewer consumers said they were willing to pay more than 5% more for higher animal welfare standards (between **23%** in Spain and **31%** in Belgium and the Netherlands). These results echo the findings of the recent Eurobarometer survey on animal welfare.¹⁷

Even though our survey took place during a period marked by record food inflation, **3 in 10** consumers consider it

unacceptable to pay more just to improve the welfare of animals, because food prices are already very high.

Unsurprisingly, in all countries, respondents who consider themselves in a comfortable financial situation are more willing to pay more for animal welfare than the others. Among those who are very concerned about the welfare of farmed animals (**41%** of the surveyed people), **78%** are willing to pay more, and **23%** would pay more than 10% more.

Overall, respondents eating meat/fish less than three days a week are slightly less willing to pay more – although as many as **62%** of them say they would do it.

At the same time, those who consume meat more frequently (at least three days a week) are simultaneously also more likely to be willing to pay more for food that is produced with higher animal welfare standards (**7 in 10** of such consumers).

¹⁵<https://www.efsa.europa.eu/en/topics/topic/animal-welfare>

¹⁶https://ec.europa.eu/commission/presscorner/detail/en/ip_23_4951, October 2023

¹⁷*ibid* The Eurobarometer survey found that 60% of EU citizens would be willing to pay more for products sourced from animal welfare-friendly farming systems (1 in 4 would be willing to pay up to 5% more).

MAIN TAKEAWAYS

Over half of consumers (**55%**) are confident that innovation and technology will provide solutions to improve animal welfare without increasing farming costs, in Spain and Hungary this number goes even over **70%**. While there is an important ever evolving role for technology it remains uncertain whether in the current state of play it will be able to mitigate all costs related to improving animal welfare.

... Yet their knowledge of current animal welfare practices is low

While animal welfare is of clear interest and importance to EU consumers, most consumers (over **6 in 10**) feel that they do not know enough about animal welfare practices in their country, and just **3%** of consumers say that they feel 'well informed'.

Only in Germany did more consumers (**55%**) feel 'somewhat' or 'well-informed' than 'poorly informed' or 'not informed at all'. In Hungary, **over a quarter** of consumers feel 'not informed at all' about animal welfare practices in their country.

While the percentage of consumers considering themselves to be well-informed about animal welfare practices varied somewhat (from **0%** in Hungary to **6%** in Germany), the level was still very low across all countries. The results of a knowledge test on animal welfare showed in any case that actual levels of awareness were low across all Member States participating in the survey.

How much do consumers know about animal welfare in their country?

The self-declared lack of knowledge about animal welfare practices was largely reflected in the results of a 'True/False' test on eight statements presented to survey participants on their country's current farming practices and animal welfare legislation. This exercise showed that **7 in 10** consumers can be considered to be poorly or not informed at all on this issue.¹⁸

On average, out of 8 questions, only 2.6 correct answers were given, with the highest average test score (3 correct answers in the Netherlands) still demonstrating a low level of awareness of the farming practices included in the test.



¹⁸ Respondents who achieved 0-1 correct answers were considered to be not informed at all, while those who achieved 2-3 correct answers were considered to be poorly informed.

TABLE. KNOWLEDGE TEST: ACCORDING TO YOUR SPONTANEOUS KNOWLEDGE, ARE THE FOLLOWING STATEMENTS REGARDING FARM ANIMALS (IN YOUR COUNTRY) TRUE OR FALSE? [CORRECT ANSWERS ARE HIGHLIGHTED IN LIGHT BLUE]

										Total
		BE	DE	HU	IT	NL	PT	ES	SE	
Most male day-old chicks are killed at the hatchery	False	15%	19%	33%	22%	10%	36%	29%	25%	23%
	True	33%	62%	19%	29%	55%	11%	17%	31%	34%
	I don't know	52%	19%	48%	49%	35%	53%	53%	44%	43%
Most hens have their beaks trimmed to prevent them from pecking each other	False	17%	16%	26%	24%	20%	18%	25%	36%	23%
	True	32%	46%	38%	31%	43%	36%	31%	21%	35%
	I don't know	51%	38%	36%	45%	37%	46%	44%	44%	42%
Most young calves are kept in individual stalls for fattening until they reach their slaughter weight	False	17%	18%	19%	9%	18%	18%	16%	27%	18%
	True	41%	48%	39%	54%	52%	39%	46%	33%	44%
	I don't know	42%	34%	41%	37%	30%	43%	39%	41%	38%
All animals, irrespective of their health and fitness status, can be transported to slaughter as long as their meat is safe to consume	False	24%	26%	46%	21%	27%	33%	32%	25%	29%
	True	38%	42%	22%	37%	45%	28%	33%	37%	36%
	I don't know	38%	32%	32%	42%	28%	39%	35%	39%	36%
Most pigs have their tail cut to prevent them from biting each other	False	21%	26%	42%	30%	22%	29%	31%	35%	29%
	True	26%	39%	21%	22%	44%	12%	15%	22%	26%
	I don't know	52%	35%	38%	48%	34%	59%	54%	43%	45%
Most pigs have access to the outdoors	False	43%	72%	59%	46%	52%	44%	45%	41%	51%
	True	21%	11%	17%	21%	23%	21%	23%	32%	21%
	I don't know	36%	18%	24%	34%	26%	34%	32%	27%	28%
Rules for the welfare of farmed animals are uniform across the EU	False	38%	43%	18%	31%	52%	22%	23%	48%	35%
	True	22%	22%	40%	31%	16%	32%	35%	19%	26%
	I don't know	40%	35%	42%	39%	32%	47%	42%	33%	38%
The EU has some of the world's highest regulatory animal welfare standards	False	15%	17%	12%	10%	17%	8%	10%	18%	38%
	True	34%	43%	14%	41%	34%	43%	44%	39%	39%
	I don't know	51%	40%	50%	50%	49%	49%	46%	43%	47%
Total N		986	1002	924	905	1001	783	650	934	7185

MAIN TAKEAWAYS

Some differences in levels of knowledge were observed between meat-eaters and non-meat-eaters or between those who were the most concerned about animal welfare and those who were the least concerned about the issue. But even among consumers for whom animal welfare matters more and among those who do not eat meat, only a minority were well-informed on current animal welfare practices. Moreover, knowledge of some of the most controversial yet widespread animal farming practices was low across the board.

For instance, in the EU, most male day-old chicks are culled at the hatchery with around 330 million killed every year.¹⁹ However, just **over a quarter (29%)** of respondents from countries where this practice is permitted are aware of this. Awareness is highest in the Netherlands, where **over half (55%)** know that this practice occurs, while only **1 in 10** Portuguese consumers could correctly identify it as a practice which takes place in their country.

Yet the practice of killing male day-old chicks is clearly a serious ethical issue for consumers. The recent Eurobarometer poll on animal welfare revealed that **three quarters** of EU citizens find this practice to be unacceptable, with over half saying it should not be permitted even if this incurs price rises for eggs.²⁰ Arguably, should knowledge of such practice become more widespread amongst EU consumers, the importance they attach to improvements in animal welfare standards could increase in parallel.

Even in countries where certain animal welfare standards are higher than

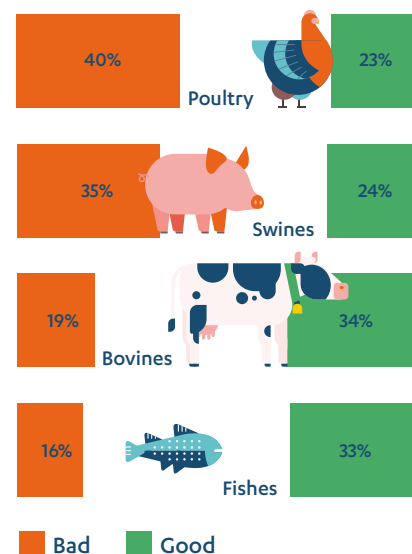
average, levels of awareness of the better standards appear to be generally low. In Sweden for example, one of two EU countries where the routine tail docking of pigs has been banned, only around **1 in 3** consumers are aware of this; most consumers either stating that they did not know if the practice occurred in their country (**43%**) or that they thought this practice did take place (**22%**). In Germany, which is the only Member State to have implemented a ban on the killing of male day-old chicks (since January 2022), only around **1 in 5** consumers can correctly identify this.²¹

The only statement for which a majority (**51%**) could correctly determine whether it was true or false was the statement *'Most pigs have access to the outdoors'* (which is false). **7 in 10** German respondents could correctly identify it as a false statement while in Sweden and Belgium **4 in 10** could do so.

In general, consumers perceive chickens and pigs to be the farmed animals with the worst welfare conditions

The number of respondents who think that the welfare conditions for chickens are 'bad' (**40%**) is almost double the number who believe such conditions to be 'good' (**23%**). On the other hand, more consumers felt that the welfare of beef and fish was 'good'. For example, **34%** said that the welfare conditions of cows were 'good' while **19%** felt that the conditions were 'bad'. German consumers were the most likely to believe that welfare conditions were 'bad' rather than 'good': **54%** of respondents from Germany felt that welfare conditions for chickens and pigs were 'bad'.

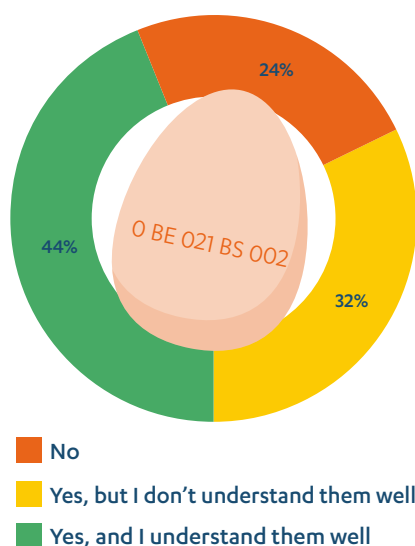
ACCORDING TO YOUR PERCEPTION, HOW ARE THE WELFARE CONDITIONS OF THE FOLLOWING TYPES OF FARM ANIMALS IN YOUR COUNTRY?



Consumers want clear and meaningful information on farmed animal welfare

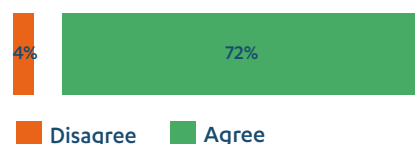
In the EU, there is currently only one mandatory animal welfare labelling system: it applies to table eggs which are coded according to four different production methods (0 = organic, 1 = free range, 2 = barn or 3 = cage). However, our survey found that most egg-buying consumers have either not noticed this coding (22%) or have noticed it but do not understand it well (33%). While for organic and free-range eggs, a mention of the production method is generally indicated very prominently on the egg box packaging, this is obviously not the case for cage eggs – making it less straightforward for consumers to identify such eggs.

LABELS ON THE PRODUCTION METHOD HAVE YOU EVER NOTICED LABELS/CODES INDICATING THE EGG PRODUCTION METHOD?



Unsurprisingly, given the current low level of knowledge consumers say they have on animal welfare practices coupled with their high level of interest in how animal source foods are produced, a very strong majority (over **7 in 10** consumers) want to see method-of-production labelling extended to all other animal products (meat, milk, dairy etc.).

TO WHAT EXTENT WOULD YOU AGREE WITH THE IMPLEMENTATION OF A SIMILAR LABELLING ON THE PRODUCTION METHOD ALSO FOR ALL OTHER ANIMAL PRODUCTS?



The provision of information about the way in which animals have been reared for food production has potential to help consumers to identify animal products produced to higher welfare standards in the supermarket.

Consumers have low trust in animal welfare claims

In the absence of mandatory method-of-production labelling for most animal products, there now exists a significant number of voluntary animal welfare claims across the EU.

A recent Commission study for example found 51 voluntary animal welfare claims in use.²²

In general, although most consumers have noticed such claims, there are some differences between countries: consumers in Hungary or Belgium were much more likely to say they had never seen these claims (**28%** and **21%** of respondents respectively) while the figures in Germany and Sweden were much lower (**5%** and **9%** respectively).

Amongst the **8 in 10** consumers who have noticed such claims on the packaging of some products, only **23%** trust them. Indeed, only in Sweden, the

Netherlands and Belgium did more consumers say that they trusted these claims compared to those who do not trust them.

Experiencing 'animal welfare-washing' damages consumers' confidence in the brand making the deceptive claims and in animal welfare-friendly products overall. If they were to find out that animal welfare claims were false, **84%** of consumers said they would somehow react while only **6%** said that they would buy the product anyway and **10%** that they would still buy the product but only if cheaper than the alternatives. **42%** of respondents would stop buying from that producer/brand, **35%** would feel they have been manipulated, and **19%** would even discourage their friends and family from buying from that brand.

Consumers think the transition to higher-welfare systems should be fair to farmers

Our survey shows a clear recognition by consumers that farmers should be fairly compensated for their efforts when moving towards higher-welfare farming systems. **Three quarters** of respondents (**74%**) would like the EU to provide funds to farmers to implement higher animal welfare standards. **8 in 10** consumers also agree that EU rules on animal welfare should equally apply to third country exports of animal products into the EU.

¹⁹https://food.ec.europa.eu/animals/animal-welfare/animal-welfare-practice/slaughter-stunning_en

²⁰Special Barometer 553 (99.1): Attitudes of Europeans towards animal welfare, March 2023

²¹The practice will also be ended in France, Italy and Austria soon, but these bans have yet to be implemented in these countries.

²²European Commission, Directorate-General for Health and Food Safety, Maestre, M., Campbell, L., Etienne, J. et al., Study on animal welfare labelling – Final report, Publications Office of the European Union, 2022, <https://op.europa.eu/en/publication-detail/-/publication/49b6b125-b0a3-11ec-83e1-01aa75ed71a1/language-en>.

WHAT SHOULD POLICYMAKERS AND FOOD CHAIN ACTORS MAKE OF THESE RESULTS?

Consumers in the EU eat meat frequently. Although our survey showed that most consumers do not eat it every day, consumption of meat remains high across Europe, and above recommended intakes. At the same time, our survey confirmed that animal welfare matters a great deal to consumers, with a vast majority (**89%**) saying that it is important to implement stricter rules on the welfare conditions for farmed animals.

The high levels of production and consumption of meat and dairy products have clear implications for the welfare of farmed animals but the hidden costs to the environment, climate and human health are also significant. While there is a growing consensus that we need to eat 'less' meat, there is simultaneously a strong demand from consumers for 'better' meat, produced to higher welfare standards. Moreover, it is undeniably difficult for consumers to identify such meat in the supermarket today.

Here are our policy takeaways and recommendations for public authorities:

The European Commission should swiftly publish its planned proposals to revise animal welfare legislation.

Our survey demonstrates the strong consumer interest in animal welfare

and the clear demand for better welfare standards for animals raised for food production purposes. Moreover, the considerable number of scientific opinions produced by EFSA underline the failure of current rules to ensure adequate farm animal welfare. The revision of current EU legislation should therefore be a priority for the next legislative mandate.

These proposals should be in line with consumer expectations and based on EFSA's scientific recommendations which include more living space for farmed animals, an end to the use of cages and the prohibition of mutilation practices.

The EU should improve and extend method-of-production labelling to all animal products.

In spite of the high interest in animal welfare, consumer knowledge of current animal farming practices is low. This can be in part explained by the lack of mandatory welfare labelling. Unsurprisingly therefore, there is a clear demand from consumers to have more information in the supermarket. Our survey showed that a strong majority say they are in favour of extending the method-of-production labelling to all animal products, not just eggs as is currently the case. At the same time, egg labelling could also be improved

as around **1 in 2** consumers have not noticed it or do not understand it.

Any future animal welfare label should be independently developed, demonstrating with robust scientific research that consumers can objectively understand it and should be applied to all products. It should also be accompanied by awareness and educational campaigns to clearly explain such labels to consumers in order to enhance their impact.

Food companies and retailers must show the way and live up to their voluntary commitments.

To meet consumers' demand for higher welfare animal products, there has been a significant increase in the number of voluntary commitments made by both retailers, food companies and the out-of-home sector. For example, over 300 food companies in Europe have now signed up to the 'Better Chicken Commitment', a set of higher welfare standards for broilers.²³ It is very welcome that these private sector actors are responding to consumers' expectations for higher welfare standards, yet it is essential that these commitments are fulfilled. Our survey shows the reputational (and financial) risk such companies run, should consumers discover that any claims on higher welfare were



false. The most common reaction consumers would have in such cases would be to stop buying from that brand.

The EU and Member State authorities should ensure that the move to ‘less but better’ meat production and consumption is socially just for farmers and consumers.

The implementation of EFSA’s scientific recommendations for farmed animals are likely to incur at least some costs to farmers and eventually end consumers. Our survey shows that **7 in 10** consumers are willing to pay at least a bit more for higher animal welfare (‘better’) products, although to a varying extent. Of those willing to pay more, **half** are ready to pay only up to 5% more, **30%** are willing to pay up to 10% more, **12%** are willing to pay up to 20% more and **8%** are willing to pay over 20% more.

Still, **3 in 10** respondents are not willing to pay more – and those who are less well-off being more likely to have reservations about it. In the context of record food prices including for animal products, consumers with lower income are more likely to be affected by potential

price rises, including any incurred from future improvements in animal welfare standards. While a very large majority of consumers considers it important to improve animal welfare standards, EU and national governments must pay attention to how the impact of moving towards higher welfare systems is distributed. They must ensure that the costs of this transition are equitably shared and not borne by consumers only.

Likewise, farmers should receive financial support to move towards higher welfare systems.

Policymakers need to foster food environments which make healthy, more plant-rich diets easier for consumers.

With meat intakes exceeding recommendations by 2 to 4 times in many EU countries, moving to less meat-heavy diets can benefit consumers’ health, even more so if it is accompanied by increased consumption of healthy plant-based foods such as pulses. Yet, our survey shows that introducing more pulses (including beans, peas and lentils) in the diet is insufficiently prioritized by

consumers. It echoes findings from a poll carried out in Denmark by the Danish Consumer Council, which found that lack of knowledge on pulses and how to cook them remains a barrier preventing consumers to eat more of these foods.

Therefore, policymakers and actors from the middle of the chain (including the food industry, retailers, and the out-of-home sector) need to act and transform food environments so it becomes easy for consumers to shift towards more plant-rich diets.²⁴ Consumers need healthy plant-based food options which are widely available, affordable, easily accessible, as well as attractive. While consumption of minimally processed plant source foods such as vegetables and pulses should be preferred, plant-based alternatives to animal products (such as ‘veggie burgers’) can play a role in transitioning to diets with lower amounts of animal proteins, for example by offering convenience for consumers. Food manufacturers should work on improving the nutritional composition of these products, while policymakers should ensure their denomination neither confuses consumers nor discourages them from buying these products.

²³<https://betterchickencommitment.com/eu/commitments/>

²⁴BEUC, Eurogroup for Animals and the European Public Health Alliance. *The illusion of choice: why someone already decided what you will eat for lunch*. June 2023.



FARM ANIMAL WELFARE: **WHAT CONSUMERS WANT**

A survey of Europeans' understanding and expectations

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