



Faculty of Science



Animal Welfare Labelled Pork in Denmark - Room for Improvement?

Denis Simonin, European
Commission

Tove Christensen, Sigrid Denver & Peter Sandøe
Department of Food and Resource Economics
University of Copenhagen

tove@ifro.ku.dk

Sted og dato
Dias 1



Market shares for products with additional welfare in Denmark 2013



	Organic	Non-organic "welfare products"
Average	8 %	-
Egg	19 %	Premium (Free-range) 7% Medium 17%
Milk	30 %	?
Pork	2 %	Premium (Free-range) 3%, Medium 12%
Beef	6 %	Premium (Free-range) 3-4%
Chicken	1 %	<1 %



Questions to be addressed in my presentation

What do Danish consumers say about "welfare pork"?

Room for expanding medium levels of animal welfare?

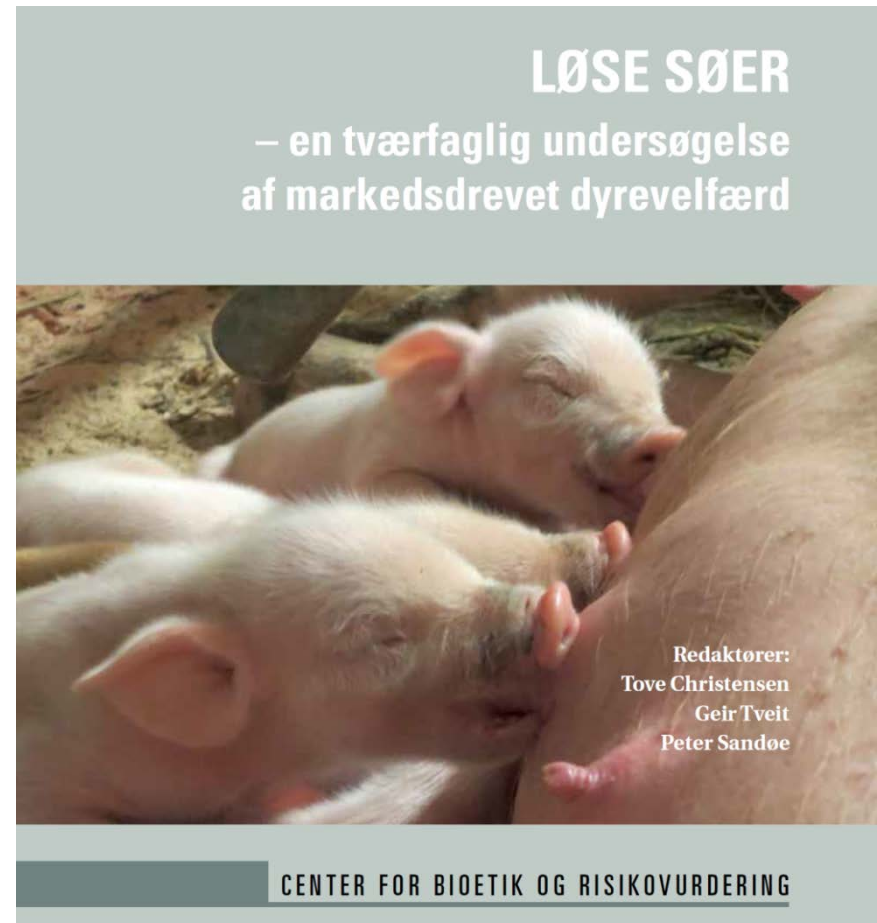
Experiences from other countries



Project (2012-2013)

Market driven animal welfare – loose sows

Peter Sandøe (IFRO, UCPH)
Jesper Lassen (IFRO, UCPH)
Jørgen Dejgaard Jensen (IFRO, UCPH)
Sara Kondrup (IFRO, UCPH)
Tove Christensen (IFRO, UCPH)
Lars Esbjerg (MAPP, AU)





People care about pig welfare

Conditions for Danish pigs are not at all satisfactory (16 %) or only satisfactory to a very low extent (25 %)


It is of great importance that (decreasing order)

- pigs have sufficient space, outdoor access, short transportation time, straw, social activity, sows are loose, organically raised

(2545 respondents)

How often do you buy the following brands when you buy fresh pork?

Brand	Never	Seldom	Some times	Often	Allways	DN
Friland (premium)	18	21	25	13	2	21
Organic (premium)	23	24	21	14	4	14
Antonius (medium)	19	22	28	10	1	19
Den go'e gris (medium)	31	17	14	4	<1	34
Bornholmer (medium)	44	16	10	4	<1	26
100% Danish (standard)	10	7	17	27	17	22

 N=2529

1 of 5 do not know which brand they usually buy



Which attributes do you associate with the following pork brands?

	100% Danish	Antonius	Den Go'ë Gris	Bornholmer	Friland	Organic
Good taste	19	45	12	18	32	34
More space indoors	6	14	9	9	24	37
Access to outdoors	4	9	4	7	53	43
Sows always loose	3	5	4	5	38	31
Approved by Danish Animal Protection Agency	6	5	5	4	31	35
Don't know the label	36	34	64	62	31	27



Do you think of the pigs' welfare when you buy the following products?

Product	Not at all	A little	Some	A lot	Very much	Don't buy
Pork roast	19	22	29	17	9	5
Minced meat	21	25	29	13	8	4
Cold sliced pork	26	30	25	8	5	6
Ready made dishes	23	23	15	5	3	32

N=2529

➔ Fresh pork: 1 of 5 think a lot – 1 of 5 does not think

Fewer think of animal welfare in more processed food





Many consumers don't know what is behind the various brands or what brand they buy

... but who wants to know more and who does not?

... and how do we induce them to think about animal welfare while shopping?

If you should pay more for pork, which 4 characteristics would be the most important for you?

Characteristic	Chosen (in %)
Outdoor access	51%
Danish	49%
More space indoor	46%
Fresh meat	48%
Loose sows	32%
Additional environmental concern	18%
No tale docking	10%
Easy to prepare	7%
No castration	5%



Imagine that all pork becomes more expensive because sows must be loose. How would you react?

Price increase	Stop buying pork	Buy less pork	No effect	Buy more pork	DN
10 % price premium	2%	23%	67%	5%	3%
50 % price premium	21%	53%	19%	1%	6%

N=348



72 % say they will pay 10% more – only 20% say they will pay 50% more





Premium levels of animal welfare are much more expensive

Whole fresh chicken

Organic vs standard

(price increase factor 3)

Minced pork

Organic vs. Standard

(price increase factor 3)

Minced beef

Organic vs. Standard

(price increase factor 2)



Consumers are not just consumers

Three consumer segments

- Do not care about animal welfare
- Animal welfare is very important
- Animal welfare is important– but ... (“worth the money”) – bundle with other characteristics.

Super markets often offer 3 categories (of pork)

- Discount
- Luxury (organic/free-range)
- Medium products (improved indoor conditions)



There is room for a market for medium levels of animal welfare.....

but important to avoid cannibalism



What can we learn from other countries?



Faculty of Science



IFRO Commissioned work 2014 / 10

Animal welfare labels: comparison of experiences from six EU countries

by

Tove Christensen, Sigrid Denver, Henning Otte Hansen, Jesper Lassen, Peter Sandøe

(Dyrevelfærdsmærker: sammenligning af erfaringer fra seks EU-lande)

http://curis.ku.dk/ws/files/130202208/IFRO_Udredning_2014_10.pdf



Animal welfare labelled pork in other countries

Denmark

- Free-range 3%
- Organic 2%
- Super markets own brands (medium) 12%

The Netherlands

- Organic 2%
- Beter Leven, almost 40%
- Albert Heijn, supermarket chain, only BL pork



Animal welfare labelled pork in other countries?

UK

- Freedom Food 30% of British production
- Strong super markets (fx Waitrose, Marks & Spencer)

Germany

- Zum mehr Tierschutz < 1%
- Vier Pfoten 0%
- Initiativen zum Tierwohl (from 2015)
- Neuland, private brand, free-range
- Organic < 1%



Ways ahead – room for improvements

- **Market and regulation is needed**
 - Animals - not pork, public values
- **Consumers can do more but need help**
 - Increase visibility, "animal welfare is important, but...", bundle characteristics
- **Retail, processing and slaughteries**
 - Free choices, private labels, differentiation, CSR, price politics
- **Animal welfare organisations and authorities**
 - Trust worthy labeling vs. differentiation (dilemma)
- **Make it easy for consumers to choose what they/we want**



Faculty of Science



£3.20	Mozzarella, Sun Dried Tomatoes, Fresh Basil & Pesto (V)	£4.50
£3.20	Mature Cheddar, Red Onion & Tomato	£4.50
£3.20	Falafel & Humus melt	£4.50
£3.20	BBQ Chicken & Bacon melt	£4.50

Free Range Plain Ham

Nestling

The na

and the C

Keswick's na

"the d

"It is said that
a hungry man is more interested
in four sandwiches than four freedoms"

Senator Henry Cabot Lodge
1919

360 pcs

Cafe and

Country	100% Organic	100%
England	100% organic	100%
Scotland	100% organic	100%
Wales	100% organic	100%

Thanks !