

Food integrity in the food chain: How can the animal production sector contribute?



ATF & EAAP 5th Special Session | 28th Aug. 2017 | Tallinn, Estonia
ATF 7th Seminar | 26th Oct. 2017 | Brussels, Belgium

Report: Outcomes from events

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Outcomes from events

Table of contents

Background	3
Programme of the ATF & EAAP Special Session	4
Expectations from public policies	5
Diversifying consumption patterns: consumers and meat	5
Vision in human nutrition: Bleu-Blanc-Coeur approach.....	5
Expectations from the industry	5
Vision from the processing industry: Sodiaal	5
Differentiation strategies in the dairy industry: focus on retail	5
Farmer involved in intensive production under a partnership with industry	6
Panel discussion	6
Closing remarks	7
Programme of the ATF Seminar	9
Session 1: Visions from public policies and the civil society	10
Animal production in products quality, how can research contribute?.....	10
Vision from the consumers' perspective	10
Vision from a scientist in human nutrition	10
Vision from a public health perspective on sustainable healthy diets.....	10
Panel discussion	11
Session 2: Visions from the private sector	12
Retail industry - The consumer co-operative take	12
Meat industry – Tönnies' vision (pork processing industry, Germany).....	13
Meat industry – VanDrie Group's vision (veal industry, Netherlands).....	13
Dairy industry – Vision from Arla Foods, Denmark	13
Farmers' approaches: available levers to support differentiation strategies	13
Portuguese pig farmers launch their own brand	13
Panel discussion	14
Closing remarks	15

Background

Food integrity in the food chain: How can the animal production sector contribute?

The demand, consumption patterns, consumers' engagement and perceptions of food are **changing and diversifying**. A growing part of consumers become more interested in how their food is grown, processed and brought to market. The consumption of meat and dairy products per capita is decreasing in most European countries, with differences according to countries and species. This consumption may decrease even more as a consequence of the development of radically new technologies (e.g. cultured or vegetable "meat", vegetable "milk", insects...) as affordable alternatives and new consumption patterns (e.g. flexitarianism...). Besides a main stream, we see an **increasing segmentation of the market**.



While safety issues remain a priority, the market needs products with new characteristics/qualities and products better suiting the requirements of specific populations (pregnant women, young children, seniors, people experiencing intolerances or allergies...). Beyond the nutritional and organoleptic qualities ("**intrinsic value of food**"), other criterion such as environmental footprint, animal welfare or the production of public goods (open landscape, image of naturalness...) are determining consumption choices. This is also called the "**extrinsic value of food**". Facing such new challenges and the necessity of attain added value from the export of animal products, food processing companies are now starting to develop husbandry guidelines for the supply chain.

More than ever, a greater **focus on animal-derived food integrity¹ (safety, authenticity and quality of products, but also their extrinsic value)** is needed to **secure Europe's role as a leading global provider for safe and healthy animal-derived**

products and help European food systems earn consumer trust. New efforts will require highly inter- and trans-disciplinary cooperation, systems and multi-actor approaches and major contribution by social sciences and humanities to find new tools and innovations along the food chain to improve quality and sustainability of the food systems, understand consumption patterns and consumer preferences.

Taking stock of the preparation of the EC-FOOD2030 strategy, during the year 2017, the Animal Task Force has engaged a dialogue between farmers, industries, stakeholders from the primary sector and from the food chain, along with decision makers, scientists and citizens to provide input for public policies and contribute to dialogue and communication in order to support the construction of animal-derived food integrity.

The ATF & EAAP Special Session, in Tallinn (Estonia), on Aug. 28th 2017, during the EAAP Annual Meeting ([link](#)) has set up the scene. The outcomes were discussed in more details during the ATF seminar, in Brussels, on Oct. 26th 2017, with a large panel of European stakeholders.

The presentations and reports of those two events can be found at: <http://animaltaskforce.eu/>.

This report is a summary of the outcomes from those two events.

¹ FOODINTEGRITY EU project, website: <https://secure.fera.defra.gov.uk/foodintegrity/>.

*"Providing assurance to consumers and other stakeholders about the **safety, authenticity and quality** of European food (**integrity**) is of prime importance in adding value to the European Agri-food economy".*

Programme of the ATF & EAAP Special Session

14:00 **Welcome and introduction**

Jean-Louis Peyraud, ATF President & Matthias Gauly, President EAAP

Expectations from public policies

14:15 **Diversifying consumption patterns**

Ellen Goddard, Professor, University of Alberta, Canada

14:30 **Vision in human nutrition**

Nathalie Kerhoas, Director, Bleu-Blanc-Coeur

Expectations from the industry as of intrinsic and extrinsic qualities of animal derived food

15:15 **Vision from the processing industry**

Frédéric Chausson, Director of cooperative development, Sodiaal

15:30 **Vision from the retail industry**

Benoît Rouyer, Economy & Territories Director, CNIEL

15:45 *Coffee break*

16:15 **A farmer involved in intensive production under a partnership with industry**

Christian Fink Hansen, Sector Director, SEGES

Panel Discussion

16:30 Panel Discussion – moderated by Vivi H. Nielsen, ATF Vice-President with all speakers and audience

- *Are we moving to more differentiated products?*
- *How can research and innovation help the livestock sector contribute to food integrity?*
- *What are the business models and tools to improve food integrity and share added value in the food chain?*

17:45 **Closing**

Jean-Louis Peyraud

Expectations from public policies

Diversifying consumption patterns: consumers and meat

By Ellen Goddard, Professor, University of Alberta, Canada

Besides the FAO projections of a global long term trend of increased meat consumption, we see declining trends of per capita consumption of meat in some countries like US. The meat industry has been responding to a demand for quick energy by developing products addressing a demand for snacking and convenience. Competition is coming from meat substitutes addressing health and environmental drivers. The vegetarian and vegan trends are growing worldwide. In Canada, traditional drivers of meat purchasing remain freshness, product flavour, product tenderness, food born disease, price, leanness, colour... But animal health and welfare, sustainability of production are of increasing importance, paving the way for a plethora of labels and certifications. In US, Canada, Australia, UK, the willingness to buy is increasing with some types of certifications showing different types of concerns according to countries. In Netherlands and UK, dietary guidelines encourage to eat less meat. There are so many issues related to meat consumption that consumers often look for heuristics to combine them.

Vision in human nutrition: Bleu-Blanc-Coeur approach

By Nathalie Kerhoas, Director, Bleu-Blanc-Coeur, France

The current consumers are seen as more connected, be willing to understand and sensitive to animal welfare, nutritional density and quality, but also looking for social link and transparency. The most frequent response from the market is to provide substitution or “lack of” (GMO, gluten, fat...) products. Bleu Blanc Coeur wants to provide a positive response to improve nutritional quality of animal products. From a human health perspective, some clinical studies comparing vegetarian and omnivorous diets show that avoiding animal products in the diet can be detrimental to human health, provoking allergies, cancers and mental illnesses, pointing the determinant role of animal products as a source of B12 vitamins. Together with INRA, Bleu Blanc Coeur has demonstrated that the nutritional and environmental quality of animal products can be improved via animal feed enriched in Omega 3.

Expectations from the industry

Vision from the processing industry: Sodiaal

By Frédéric Chausson, Director of cooperative development, Sodiaal, France

Sodiaal’s vision for tomorrow is that we are living a revolution, moving from “One Milk” to “My milk”, allowed by smartphone and the revolution in digital technologies. In the future, the consumer will choose which milk he/she wants to consume. Sodiaal wants to address more diversified expectations. Having more than 70 plants in France gives flexibility and is seen as a strength. Sodiaal’s milk is structured into a pyramid of several layers. The basis is made for everybody. Then, options are offered to the clients (mountain, DOP, “pasture milk”, “GMO free”, “Omega 3”, “Bleu Blanc Coeur”, organic). The bonus for farmers is growing along this pyramid. GMO free milk is not a concern among French consumers, but as German retailers have asked their national industry to produce a GMO free milk, Sodiaal had to align.

Differentiation strategies in the dairy industry: focus on retail

By Frédéric Chausson, replacing Benoit Rouyer, Economy & Territories Director, CNIEL, France

The price of dairy products has been stagnating in France since 2008, showing that value creation via supply differentiation has become vital for the sector. We see two main types of differentiations: public and private initiatives, and different types of private initiatives: on animal welfare, or cows fed without GMO with hay, some on regional, joint initiatives with the upstream, proximity with the final consumer, or on nutritional / health

issues. In France, many regional/national or joint initiatives with the upstream are developing. Among them, the most interesting initiative is “*C’est qui le patron?*” (or “*Who is the boss?*”). Before processing the milk, consumers were asked on a website “*What do you want in your milk?*”. This has become a real success.

Farmer involved in intensive production under a partnership with industry

By Christian Fink Hansen, Sector Director, SEGES, Denmark

The decrease in meat consumption that we see worldwide is also present in Denmark. What is critical to get is a “License to produce” in a situation where home prices are higher than on exports markets. The Danish production is divided into two standards: the “Standard pig” (95% of the market), and “Special brands” (less than 5%). In the standard pig, price is the main driver. Volumes, incomes and employment are higher, products and piglets are exported. Under “Special brands”, producers invest for a license to produce to get acceptance by society. There, we see the development of new markets, pertaining added value and cost. Differentiation creates a willingness to pay for higher standards. However, studies on the willingness to pay for food with a high level of animal welfare show that those products are very often too expensive and labelling sometimes not understandable. The Danish market implements 3 national levels, ranging from 1 heart (+20% cost) to 3 hearts level (+100% extra cost). Raised without antibiotics is a megatrend. In the near future, environmental impacts (GHG emissions) will be an important factor to take into consideration.

Panel discussion

The panel consisted out of the four panellists. Vivi H. Nielsen (VHN) moderated the discussion.

First, do we see some specific trends related to the demand for animal products?

The complexity in solving environmental and animal welfare issues has already led to differentiated products. People have valid concerns about food and limited time to look at what they should buy, they need to find the information more quickly, looking for products reflecting their own values.

The most important megatrends are “It’s now or never”, then “Personalisation”, “Transparency”, “Individual benefit to consumers”. Science has to work on the measurement of nutritional quality of products coming with new technologies (infrared, spectroscopy...).

We need to know the drivers that push the development of the trends influencing the consumer: are they coming from research, NGOs, public authorities, doctors, sales parameters in retail...?

Retailers aim to differentiate themselves to attract a new market. Market driven animal welfare is very strong. In France, nobody wanted GMO-free milk at consumer level. But once a processor agreed to deliver, others had to follow. Consumers are concerned by the way we produce, hence, farmers have to address the license to produce in the place they have their farms. Transparency is important, but being too much transparent may lead to controversies. Things looking common sense to agricultural professionals are not understood by the general public. At the end, the market always wins. Fairness may be facilitated by new technologies.

Social media promote headlines, bad stories, fake news.

Looking at the value chain, we are all squeezed between big commodity suppliers at the one hand, and retailers on the other hand. In the framework of the next CAP, farmers will trigger to get a revenue from the products. Some consultations in the industry show that investment in innovation allows to get more added value.

What fraction and which parts of the population demand has increased segmentation of the market?

In Denmark, “KKK” “critical women in Copenhagen” account for 10% of the population, driving the debate on sustainability and animal welfare. Dairy industry in Finland sees big changes among consumers and society. In Norway, productivity and efficiency have improved so much that prices have decreased a lot, leading to scandals and side effects of those improvements. In reaction to an extreme, a growing demand for values and a demand for products produced in a slow way can be seen.

There are fashions in nutrition: 10 years ago, butter was considered unhealthy. Now, it is back on top in nutrition recommendations. In France, despite a lot of investment on pre-competitive studies to discover health positive effects of milk, we still see a decrease of milk consumption.

The correlation between increased performance and lower levels of animal welfare has to be fully determined by science and it will take time... while at the end, the market wins.

What can the sector do to accommodate the gap in communication?

We need a much better communication between farmers, consumers and the whole value chain. Research and Innovation can help to do that. As scientists, we have to communicate science better. Creating communities of livestock farmers, chefs, and consumers allows to showcase the work of professionals and explain how products are processed. We should be active on social networks (NGOs are very good at it). We need social engineering and social sciences to help us communicate, teach, educate. We should not consider the consumer is wrong. We have to admit there is a problem, then hope you can start communicating.

We have to define strategies for improvement: we can improve significantly animal welfare for a small proportion of the animal population that brings a huge benefit to a small numbers of animals. Or we can improve at a lower level the benefit for many animals. It is difficult to get an extra premium on the global markets.

We have to look at solutions in an integrated manner and consider trade-offs.

How do we see the production systems in EU in the future when we need a great diversity of products, relying on different production systems and regional differentiation?

We need to collectively share a vision of what standards we want to offer, otherwise, in the chaos, the more flexible businesses will take advantage of the situation.

In the future, we have to make sure innovations are used to support differentiation of products and address the need of the society, in a context of lower consumption.

When we talk about fairness, we should not consider the EU in isolation. The issue is on the world scale.

Research and innovation should continue to support the improvement of food integrity.

Circular bioeconomy is the base word; we have to look at farming in the region/world with a circular perspective.

VHN: Last year, our topic was “circular bioeconomy”, and we showed that livestock production is crucial for a circular bioeconomy. This year, it has become clear that livestock production is essential for a healthy diet. We can end up with the conclusion that European diversity is the way forward: a diversity of products produced in a diverse production systems in a range of diverse European regions. We need research and innovation to support this diversity.

Closing remarks

By Jean-Louis Peyraud, ATF President

We have covered the whole food chain, from farmers to consumers, via suppliers, food processors, retailers. We have acknowledged the changes in **consumers’ expectations**. Consumers are more and more engaged, they want to know how food is produced. They are also more and more informed and educated. Their rationality is different from the rationality of researchers in animal sciences. This is leading to conclusions like “meat is bad for health”, “organic systems are always better for the environment”, “local food is better”, that have not been proven by science. At present, the contribution of a very small part of the population, but very active, has a huge impact on consumers and decision makers. This trend has been reinforced by a lot of crisis due to unscrupulous actors that changed the sector’s image and the consumer perception. Behind the vegan movement, antispecism promotes a disruptive vision of the role of animals and humans in our societies.

The speed of social transformations is very rapid and there are fashions in nutrition. The status of meat in our diet has also changed: 20 years ago, it was a sign of wealth. Changes in consumption habits also bring opportunities. We have addressed new drivers of consumption of milk and meat: organic, GMO free, green, carbon neutral, animal welfare, no antibiotics, no hormones, local.

Industries' main lever is to develop innovations with the support of research. We see an increasing segmentation on intrinsic or extrinsic qualities of the products. The type of segmentation can be different between countries, but the strategies of big players can align on global market. Products segmentation happens at different scales: nutritional value, animal welfare, non GMO fed animals, new structuration of the offer, local and/or short chains, internet (short) food retail, organic food... But how to create added value through differentiation, using which kind of contracts? Technology is part of the response: e.g. meat substitutes and new technologies of communication and information. At the end, price is and will remain a major criteria.

We need **research** to innovate to provide higher level of transparency using new technologies and to provide science-based information to value chains (like valid criteria for animal welfare assessment). We also need to co-design research programmes with stakeholders and the society, including the society at the very beginning of research process, to foster social acceptance.

ATF 7th Seminar | 26th Oct. 2017 | Brussels, Belgium

Programme of the ATF Seminar

09:30 Welcome and introduction

Jean-Louis Peyraud, ATF President

@AnimalTaskFrc

Session 1 – Visions from public policies and the civil society

09:45 Role of animal primary production in products quality, how can research contribute?

Jean-Charles Cavitte, European Commission - DG AGRI

@EU_Agri

10:05 Vision from the consumers' perspective

Camille Perrin, BEUC - European Consumer Organisation

@Perrin_Cam @beuc

10:25 Vision from a scientist in human nutrition

Philippe Legrand, Agrocampus INRA

@agrocampusouest

10:45 Vision from a public health perspective on sustainable healthy diets

Nikolai Pushkarev, EPHA - European Public Health Alliance

@EPHA_EU

11:25 PANEL DISCUSSION

moderated by Martin Scholten, WUR

@mcthscholten @WUR

With all speakers and audience

Session 2 – Visions from the private sector

14:00 Retail industry: Intrinsic and extrinsic qualities of animal-derived food - the consumer co-operative take

Silvia Schmidt, Euro Coop

@89SilviaSchmidt @EuroCoopTeam

14:20 Meat industry

Egbert Klokkers, Tönnies

Marijke Everts, VanDrie Group

@MarijkeEverts @VanDrieGroup

15:00 Dairy industry

Hanne Bang Bligaard, Arla Foods

@arla

15:20 Farmers' approaches: available levers at farm to support differentiation strategies

Seán Finan, Farmer from Ireland, CEJA

@finan_sean @_CEJA_

15:40 Portuguese pig farmers launch their own brand

António Tavares, Farmer from Portugal

16:00 PANEL DISCUSSION

moderated by Martin Scholten, WUR

@mcthscholten @WUR

With all speakers and audience

17:30 CLOSING

Session 1: Visions from public policies and the civil society

Animal production in products quality, how can research contribute?

By Jean-Charles Cavitte, Research Policy Officer, European Commission - DG AGRI

There are various definitions of food products quality, including intrinsic and extrinsic qualities. Legislation, standards and contractual arrangements aim to build traceability, transparency, verifiability and foster trust. Some relevant agriculture policies drive products quality. There are challenges to animal production that influence the public perception of animal agriculture: nutritional value, effects on health, provision of public goods, efficiency compared to plants to produce edible proteins, farmers' income and aging population, societal concerns over intensive livestock production... In the last and current work programmes, several projects have dealt/deal with intrinsic and extrinsic qualities of food and integrity. **Extrinsic value refers to many aspects related to societal interests and sustainability, corresponding to concerns prominent in the animal primary production.** This vision allows to move from a defensive approach to a more positive approach of animal food. Europe is well placed to defend those values. Citizens are keen on these values, but will consumers be willing to pay? Drawbacks/trade-offs may be considered: e.g. quality vs. quantity, safety vs. naturalness, competitiveness vs. price, etc. Finally, we need a systems' approach including food chains, both interdisciplinary and multi actor.

Vision from the consumers' perspective

By Camille Perrin, Senior Food Policy Officer, BEUC - the European Consumer Organisation

We see an on-going trend of stagnation of meat consumption, especially red meat, in most European countries. It is supported by some national dietary recommendations advising to reduce consumption, and influenced by media reports on abattoirs and stories by welfare organisations exposing illegal activities. The trust factor has been hampered by food scares that regularly came up in the media, starting from the mad cow crisis in 1986. This has an impact on consumption, together with changes in habits, like a demand for less processed food. It has led to a debate on transparency in the food market. Knowing where food comes from is a strong demand from consumers, reflected in a request for adapted labelling on food products. A study shows a growing demand for better welfare of animals in Germany, associated with a consent to pay. We also see a trend towards the cutting on antimicrobial use. A study shows that people tend to prefer low tech and natural solutions, not changing habits, they are willing to accept some technologies but they are unsure about high tech like meat biotechnologies, lab produced meat, chlorine wash.

Vision from a scientist in human nutrition

By Philippe Legrand, Director of the Human Nutrition Biochemistry Unit, Agrocampus INRA

The history of nutrition demonstrated that the solution for malnutrition always relies on a lack of access to animal products. The question is not about products but consumers' choices. Common errors in nutrition are: 1. Eviction (leading to deficiencies) or overconsumption; 2. Opposing plants to animal food. We are omnivores. Nutritional recommendations are changing over time and science is evolving. Avoid eviction is a precaution principle: we do not know yet what molecules are helpful to regulate aging. A lady without DHA is likely to have an Alzheimer disease at the age of 60-65 years old, and a vegetarian to have neurodegenerative diseases. When we evict products, we evict molecules that may be necessary. The balance of the diet comes from menu. Therefore we should promote informed choices and education.

Vision from a public health perspective on sustainable healthy diets

Nikolai Pushkarev, Policy Coordinator for Food, Drink and Agriculture, EPHA - European Public Health Alliance

The food system is a major driver of pressures on the planet boundaries. We face a dual burden of undernutrition and obesity globally. Looking at the recommended diets for human health vs. for planetary health, we see that

animal products have both the lowest share in dietary recommendations and the higher environmental impact. As a consequence, we should increase plant-based food and decrease animal products consumption. In terms of sustainability, we cannot speak of production separately from consumption. The sustainable diets concept should guide our understanding of what is efficient use. Consumption patterns are not a given, we should consider them as a policy challenge. We should mainstream LCA models into analysis of food policy, applying full cost accounting, elaborating scenarios to discover possible society wide repercussions of adopting different types of diets, more research into the concept of “nutritional yield”, more priority to policy implementation research.

Panel discussion

The panel consisted out of four panellists. Martin Scholten (MS) moderated the discussion and opened the panel session with a slide and a series of questions.

Producers’ perception might differ from consumers’ perceptions. Are we going to create new alliances of consumers and producers? Can producers fulfil the whole bunch of various individual demands? What if a consumer demand leads to a less efficient and thus lower sustainable production?

In EC-funded research and innovation programmes, the concept of integrity is highly focused on food safety. We see the consumer has a broader perception of food integrity, encompassing sustainability.

It is difficult to relate on the gap between consumers and producers. Food consumption is linked to marketing, food price, a combination of physical and non-physical attributes that shape attitudes, but we see growing awareness. The retail level should help the consumer to make an informed choice. Consumers adapt to producers and processing. Once the retail sector decides to do something, it will go down to the farmers. Farmers have a lot of levers on the quality of food. Not all producers can fulfil all demands.

There is not a whole bunch of demands to serve. There are different sub sets of consumers that have to be matched. This opens for a variety of production systems and products.

European consumers demand a lot. It would be important that countries in EU apply the same standards. There is also a great demand for short supply chain, local producers and a general demand for providing consumers with information (origin, systems of production, farmers’ practices). We should look beyond discourses of citizens, consumers, at attitudes and acts that might be contradictory. Should we take the perception of consumers for granted? Even the NGOs try to influence the consumers. H2020 multi-actor research and innovation projects have to involve end-users. We should consider incidence of the media that increase the gap in perceptions.

Legislation, in particular on climate change, can prevent producers from making non sustainable choices. We have to use a systems approach to look at sustainability issues and include consumption sustainability.

On the nutritional side, probably we eat too much. We have to protect children and elderly persons. The core question resides in “how much should we eat of everything?”

How can science and research provide a sound basis for animal based Food Integrity? How can research develop and showcase good practices?

The criteria to evaluate products’ quality should enrich with many options. The current LCA analysis as it is, is not relevant. It is adding functional units that should not be summed up and has no link with nutritional content. Can we produce a nutrient-index of food? Our food systems are affecting our biodiversity, our soils are more and more agroponic, less and less sequestering carbon; this is a real concern for the future. How to calculate the sustainability of food is a very complex issue involving a lot of actors. LCA is currently used in the context of environmental assessment and climate. In research, to assess the sustainability, you need to consider environmental, social and economic aspects. Higher quality products provide more room for manoeuvre than when margins are low.

We should use consequential analysis: if we want to shift from animal to plant protein, this may lead to use more pesticides to increase crops productivity.

We hear too often that efficiency leads to sustainability, but many producers face profits that are so low that they are forced to further intensify and industrialise. We need a change in policy to get out of this system.

Legislation could help reach intrinsic quality of food and nutrient compounds, provided that it could manage the diversity of situations and products. Why not specifying minimum of DHA or APA in livestock production and use the CAP payments as incentives to reduce lameness, mastitis, use of antimicrobials, etc.?

We have to manage more complexity, there is no single solution and we have to deal with diversity. We should not do anything too simplistic nor linear with only efficiency as a unique criteria, using a diversity of criteria for evaluation to accommodate the diversity of demands. This needs dialogue and cooperation, which is not easy, with the big diversity of demands and opinions.

Can we build a narrative of animal-based food integrity, balancing the goodies and baddies?

What are the key intrinsic or extrinsic values of meat, dairy and eggs?

Should we consider nutritious food products or healthy diets? Healthy consumption or fair production? Citizens or consumers?

We should be careful about the narrative regarding quality: there is a big trend towards local products, but short chain products do not necessarily mean quality products. In France, “a good revenue for farmers” is a narrative. It has been a starting point for a new product line called “C’est qui le patron?” that works well. The narratives should not be excluding each other. We should consider both legal requirements and private standards and strategies by retailers responding to consumers in proposing differentiated products.

Extrinsic qualities of food encompass: animal welfare, territories, landscape, ethics, environmental issues, etc. This is much more complex and we need to provide information to citizens so that they can make informed choices. Sometimes, we see people opposing intensive and extensive systems, while the intensity of production is not always a relevant criteria.

For consumers, nutritional quality is key, but when we consider healthy diets, is the composition of one specific product a key issue anymore? Human health is an important issue. Intrinsic values are important to form nutritious food and healthy diets. Healthy diet/consumption and fair production should be possible. We are moving from the “One Health” concept to the “One welfare” concept, meaning a production systems that is good, both for animals and humans.

Session 2: Visions from the private sector

Retail industry - The consumer co-operative take

By Silvia Schmidt, Food Policy Officer, Euro Coop

Euro Coop sees as a big trend a decrease in meat consumption, trends towards local, organic, animal welfare and quality products. On the retail side, cooperatives are investing in their own brands. Among consumers, there is a raising awareness on quality assured products, no hormones, no GMOs-fed animals, no ingredients or additives, no cloned animals, strict use of antibiotics. Looking ahead, animal health and welfare are also priorities. A collaboration with CIWF and Red Tractor has allowed to fine-tune standards for labelling on animal welfare (Netherlands and Denmark). Co-ops have a focus on origin and local foods: e.g. in UK, 90% of Co-op consumers feel supermarkets should sell more food from British farms, 50% want to know the origin of a product. We need research on environmental and climate change issues to develop and implement sustainable practices for animal husbandry. We need cooperation, sharing of best practices and improve consumers’ information.

Meat industry – Tönnies' vision (pork processing industry, Germany)

By Egbert Klokkers, Director of beef sector, Tönnies

The company is facing a variety of agricultural structures in the world, a diversification and moving consumers' trends. "Beef is sexy, chicken is sexy": the veggie-vegan trend is down in Germany, flexitarian in Germany is the key trend. Challenges for the meat industry are growing: food safety and traceability become the most important topics. To keep trust in products, the company has a value chain approach of quality, ranging from research activities to traceability, including checks on animal protection and food safety at farm level, care of animal welfare at the slaughterhouse, checks of food safety parameters in laboratories, products safety, safety and preservation of organoleptic quality of products throughout processes... They aim to develop an antibiotic free fattening. Segmented offers have to expand because markets are saturated.

Meat industry – VanDrie Group's vision (veal industry, Netherlands)

By Marijke Everts, Sr. Corporate Affairs Advisor, VanDrie Group

Integrity and ethics are really important for a meat producer. Citizens are very critical for unpleasant odours, animal welfare, surplus manure and use of antibiotics. We have to be transparent. The company has started a dialogue with citizens and consumers this year and has reduced their use of antibiotics by 57%, which is still below the Dutch government's objective of 70%. On ecological impacts, meat and animal feed production are receiving attention. The company recognises it and strives to source locally in raw materials and feed, use renewable energy, and wishes to recover phosphate from manure. On the economic side, unrest in the trading market has forced the company to develop hybrid meat products mixing vegetable and meat proteins.

Dairy industry – Vision from Arla Foods, Denmark

By Hanne Bang Bligaard, Senior Specialist on Sustainability, Arla Foods

Dairy farming has a place in sustainable diets. We see the current trends in consumption habits: more and more persons living in cities looking for natural and/or local healthier choices, different ways of eating and needs, for milk powder for kids, people looking for food safety and nutrients. European consumers are increasingly rejecting fresh milk (1-3% p.a.), due to taste, difficulty to digest and tolerate, environment/animal issues of human health issues... 75% of consumers still give us a license to play for affordable milk ensuring quality, food safety, taste, healthiness... We should consider the nutritional quality when we evaluate environmental impacts of food. Arla develops specific products to address specific customer's needs (seasonal, organic, animal protection, and mountain cheese, lactose free...). Values associated to dairy as part of sustainability are: animal welfare, minimal environmental impacts, maximal ecosystem services, upgrading inedible resources to human edible and high quality protein, nutritional quality.

Farmers' approaches: available levers to support differentiation strategies

By Seán Finan, Farmer from Ireland, CEJA Vice-President

Education, discussion and knowledge transfer groups are levers for differentiation strategies. In Ireland, differentiation is often made by improving soil fertility, reduce chemical fertilisation by grazing rotation systems, reduction of the carbon footprint (e.g. quality insurance scheme, Origin Green initiative), smart farming to reduce feed, water usage. CEJA has just produced a survey among dairy farmers called "Building a sustainable sector" including recommendations for the next CAP. It shows that most European young farmers are environmentally conscious. They believe that sustainable farming contributes to the protection of the environment and that a healthy environment provides them with benefits, namely biodiversity and ecosystems, enhanced natural resources, efficiency improvements.

Portuguese pig farmers launch their own brand

By António Tavares, Farmer from Portugal, Chairman of COPA-COGECA Working Group Pork & pig meat

The family farm has decided to create its own brand, acknowledging the meat consumption decrease in EU, a volatile international market, and the crucial need to increase internal market. The sector is often under attack. We see a change of lifestyle in young generations, the consumer is lacking information, and vegan associations are very aggressive. EU produces the most safe and highest quality meat in the world: We don't use rhodamine, antibiotics control, nor growth promoter, we have higher standards of animal welfare, environmental impacts. We should differentiate: the consumer is willing to pay higher prices for a higher quality. In Portugal, there is a strong pressure from supermarkets, the industry imports meat at lowest price possible without regard to quality. This leads to a lower consumption. The farm brand offers total traceability, pork feed based on cereals, animal welfare conditions above standards of current legislation. Still, as the brand was launched by producers alone, it is not well perceived by some retail industries and distributors. On the positive side, there is a great acceptance by consumers, good communication, and strong commitment from producers.

Panel discussion

The panel consisted out of four panellists. Martin Scholten (MS) moderated the discussion and opened the panel session with a slide.

Are there good examples of taking up challenge of food integrity?

Is the agri-food business well prepared for expected transitions in the food system: for more heterogeneity of the demands, for delivering personal food, addressing health care or personal societal concerns?

Are farmers going to entrepreneurship in new business concepts?

Retail, industry and farmers are moving to address societal concerns. We see good examples from the industry doing its best to address societal challenges. The agri-food business seems well prepared, it can adapt. The industry is faster than politics.

What about the farmers? All the food chain actors have to work together. The information should flow down and allow adjustments. Hopefully, young farmers are more market-oriented, more educated, more involved in vocational education. We also need to be aware of the volatility in industry, this needs support from the CAP. Still, farmers have now the same expectations as other people, they don't want to wake up at 3 am; they want to have a normal life. How to transfer this reality to consumers?

Farmers and industry need to embrace the technologies of the 21st century and make use of apps for traceability, better care of the animals, inform suppliers and consumers. However, the new data regulation is a problem: there is a huge difficulty to get databases released and open. At present, meat industries still operate in a kind of 20th century. They keep track of their feed via ICT, but don't share it with other companies; it's considered privacy. The meat sector is very innovative, but at the same time very conservative.

In some countries, social acceptance of farming systems is a big challenge. When you look at supermarkets, there are so many varieties of meat. How to manage this diversity? How can less and bigger companies address a market with smaller market segments with a high variety of products, moving to more local production. Will big groups be in a better place to serve local food, as they will have more money to invest in supply chain? About factory farms, we need a clear definition: Portugal and Spain have intensive production of pigs to deliver to markets not willing to pay for extra quality. In Spain, we see a good example of cooperation within big integrated companies including production, feed plant, slaughterhouses. Arla Food has farms of all size: what is important is management, not the size; they want the highest quality milk to offer the farmer a decent way of living.

What is the narrative? Differentiation for internal or exports market?

We need to explain to the consumer how we process, to educate them on the benefits of meat consumption, backed up from research providing science-based information. Our biggest enemy to build a narrative is the exception of scandals and misuse of animals. As long as that happens, videos will be on social media. The only way is to be as integer as possible and convince people to get rid of every case that shows an opposite: the food system has to be cleaned, either by itself, or the social media will kill it. On the positive side, things can improve out of crisis (see: “Shaped for Sweden” production).

In meat, differentiation seems to be mainly intended to internal consumers: China wants low price, not animal welfare. Japan is the second importer of meat, they want to have high quality, EU offers the highest, but they buy from US and Canada, as the differentiation between our meat is not been explained compared to Brazilian’s, Canadian’s or US’s. However, in Ireland, “Origin Green” enables to ensure quality along the production system. Exports markets are very important in this strategy.

We have to be careful with the animal welfare narrative. While the farmer makes sure his animals are in order about animal welfare, not everybody has the same understanding of animal welfare.

We should care to have a more even distribution of livestock productions over a country, and look at it in order to improve the circular economy.

What science and research is needed for a fair narrative? How can research and innovation facilitate the agri-food sector in the transition?

There is still no solution for board taint, for making our animals more disease resistant to climate change, nor on the impact of separation of cow and calf on animal welfare. In addition, some research cannot be immediately implemented. Science knows much, publishes data that is not understood by citizens and sometimes by other scientists themselves: a scientific paper says we need 3 kg of proteins to produce 1 kg of meat, but it does not take into account inedible proteins in feed. The final aim of research is to better inform consumers, farmers, industry. We need to communicate adjusted figures to the society. To do that, we need new knowledge. We need to engage a dialogue with the society and involve the society in research from the beginning.

Knowledge should be implemented much better. It has to focus on the really big challenges. Then, the private sector can go fast when challenges are identified. The best science is produced in collaboration with the sector. Companies should open their doors to scientists to test some issues. We should work together instead of just facing problems when they occur. Engagement of society is a challenge for the private sector: we have to go out of our comfort zone, into a dialogue with the society.

Closing remarks

By Jean-Louis Peyraud, ATF President

If we want to develop more sustainable food chains providing healthy diets in a way that is respectful for the environment, we need to consider the livestock’s roles in a sustainable circular bio-economy, as part of the agricultural and food sectors. Livestock productions can deliver positive services and goods, like a lot of by-products and manure as a fertiliser. We should better use ecological processes to improve our food systems, reduce our inputs and maximise our efficiency. This needs an increased cooperation between stakeholders over the whole food chain.

Save the dates | Next ATF events

ATF-EAAP special session, Dubrovnik – Croatia

27th August, 2018

ATF annual seminar, Brussels – Belgium

7th November, 2018

Report: Outcomes from events “Food integrity in the food chain: How can the animal production sector contribute?”

ATF & EAAP | 5th Special Session | 28th Aug. 2017

ATF | 7th Seminar | 26th Oct. 2017