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Global Agricultural Information Network

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Germany wants to be trendsetter in animal welfare

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Report Highlights:

There is an ongoing intense debate about animal welfare in Germany. Consumers consider animal welfare within meat production as important. And by constitution, it has become a binding guideline for government action. However, Germany has become a world class exporter of pork and poultry. Higher animal welfare standards on national level would put German farmers at a cost disadvantage.

General Information:

Animal welfare is one of the commanding topics at the 2016 International Green Week show. In Germany, animal welfare is closely linked to intensive livestock farming and the public debate is driven predominantly by animal welfare and environmental protection organizations. A broad coalition of these organizations and non-traditional food and agricultural groups organized a counter-demonstration to International Green Week. The demonstration is supported by the German Green and Left political parties and it attracted over 20,000 protesters. International Green Week is Germany's largest agricultural fair. It is always held at the end of January and the show serves as the annual flagship agricultural policy event.

The public debate about animal welfare shows that rethinking is taking place in Germany. The attitude towards meat consumption and livestock production is changing. The majority of consumers consider animal welfare within food production as important and consumers also think that conditions in livestock production have become worse. However in reality, many consumers are not willing to change their consumption habits by either eating less meat or paying a higher price for premium or organic meat products. Organic meat remains a niche market with 2% market share. However, according to recent surveys, 30% of German consumers would be willing to spend vastly more money on products which have been produced under higher animal welfare standards.

Animal Welfare Report of the German Government

The German Federal Government has presented its Animal Welfare Report beginning of December 2015. The report especially focuses on the animal welfare activities of the Federal Government at the national, European and international level. Federal Agriculture Minister Christian Schmidt said at the presentation "Germany is making significant progress with animal welfare. That is the clear message of the current animal welfare report and that is the clear message of my initiative, "Minding animals - new ways to improve animal welfare."

Schmidt wants position Germany as a world leader in animal welfare and stressed that he favors voluntary agreements with the agriculture industry instead of regulation on the federal level. As an example, he presented the voluntary animal welfare initiative by the food retailers, which the retail sector has developed together with meat packers and farmers. Schmidt underlined, "I don't see myself only as the Minister for Food and Agriculture, but also as Minister for Animal Welfare. Specifically, this means I want to make Germany a trendsetter when it comes to animal welfare."

Since September 2014 a number of projects - both by the Federal Ministry for Food and Agriculture, as well as by the industry - have been launched. Progress was already made by the initiative, such as with a voluntary agreement to phase out the routine beak trimming of laying hens and turkeys for fattening or a wider distribution of the label "For more animal welfare" in food retail. Moreover, the Ministry promotes numerous projects for increased animal welfare in Germany. Funding for animal welfare projects in 2015 totaled €33 Million. Improvements in livestock production systems should be designed in a way that German livestock production keeps its long-term competitiveness. For livestock farmers, this means developing practical alternatives which improve animal welfare in livestock production. Schmidt declared that, "Germany needs competitive solutions that prove itself successfully on the market. Only then, food production won't move abroad."

Federal Animal Welfare Policy

Animal welfare has become a core tenant of the Federal Ministry of Food and Agriculture's (BMEL) mission. Animal welfare is enshrined as a State goal in the German Constitution since 2002 and regulated in the Animal Welfare Act. Thus, animal welfare has become a binding guideline for government action. With its "Minding animals" initiative, the BMEL is also implementing the animal welfare campaign set out in the coalition agreement. The coalition agreement of the German Government states that a national animal welfare campaign will promote the expertise of farmers and that it will develop a uniform national testing and approval procedure for animal husbandry systems. The aim is also to enforce standardized and higher animal welfare standards EU-wide.

In September of 2014, Minister Schmidt launched the initiative, "Minding animals - new ways to improve animal welfare". The aim of the initiative is to bring animal welfare further into the mainstream of society and to ensure further improvements in the conditions in which animals are kept and to bring these conditions more into line with animal needs. The initiative will initially focus on the industry taking its own actions. However, if the industry's commitment fails to result in the necessary improvements, a change in national standards regarding husbandry and breeding may also be necessary. The initiative is being governed by the Animal Welfare Group of Experts, which is compiled of 16 field experts.

Key elements of the BMEL initiative

1. Mandatory examination of compliance with animal welfare requirements for mass-produced housing equipment by an authority.
2. Ending non-curative interventions performed on farm animals (no tail docking for example).
3. Improving the animal husbandry knowledge of animal keepers
4. Further development of animal welfare in the slaughter of animals
5. Strengthening consumer awareness – better coordination of initiatives launched by the industry and the German animal welfare federation
6. Moving forward animal welfare at international and EU level
7. Strengthening research for more animal welfare
8. Group of Experts on Animal Welfare
9. Limiting the number of laboratory animals
10. More animal welfare also for pet and assistance animals

Please see link for more information on Federal Ministry's Webpage:

[Full Text of the AgMinistry Initiative](#)

Policy initiatives at the regional level

Animal welfare has also become an important topic on a regional level in Germany. In 2013, the Green Party started campaigning on animal welfare at federal and regional elections and their success shows. Today, seven of 16 agricultural ministers in Germany are Green Party members, including Lower Saxony and North-Rhine Westphalia - the heavyweights for pork and poultry production in Germany.

The Agricultural Ministers in North-Rhine Westphalia and Lower Saxony have introduced their own animal welfare initiatives called "Sustainable Animal Husbandry" and "Animal Welfare Plan Lower

Saxony” with mostly stricter regulations than planned on federal level. In pork farming regional plans have three main objectives: ban tail docking, ban castration without anesthesia, and a ban for farrowing crates. The initiatives on regional level have become one driver of the public discussion.

Promoting Animal Welfare on International Level

The German government supports and promotes better animal welfare standards at EU and international level. There is massive trade with pork and poultry within the European Union and the implementation of national standards prior to the EU would put German farmers at a cost disadvantage. Germany’s pork and poultry industry has expanded dramatically in the past decade, fueled by exports. The industry’s ability to mitigate costs while still meeting new standards would pose a challenge. However, currently there is no majority on European level in favor of stricter animal welfare standards.

With Denmark and the Netherlands, Germany has found likeminded countries on the topic on animal welfare. The three countries have signed a declaration on improving animal welfare at European level in December 2014. The aim is to achieve improved cooperation, a more transparent knowledge transfer and simplification of the regulatory environment. The alliance has the position that the current animal welfare legislation of the European Union applicable to husbandry, transport and slaughter of animals must be enforced in a stricter and more harmonized manner.

The declaration states: "The European Union must continue to put animal welfare at the forefront and it should actively develop greater awareness of the welfare of animals also at international level." In its declaration, the countries welcome the measures that the European Commission announced in its European Union Strategy for the Protection and Welfare of Animals 2012-2015. At the same time, they call upon the Commission to go ahead with the promised examination into whether the EU statutory framework for animal welfare can be simplified, while ensuring that the simplification of the existing EU legislative framework does not result in deterioration in the EU's animal welfare record. They also demand to review existing standards with respect to new scientific evidence and adjust them accordingly.

Please follow link for more information about [Joint declaration of Denmark, the Netherlands and Germany](#)

The joint declaration can also be seen as keeping market access for Danish and Dutch farmers to Germany. Traditionally around 12 million head of live swine from the Netherlands and piglets from Denmark are exported to the German market. In April 2015, new meat labelling rules came into effect in Europe. The new rules require the label to indicate in which country the animal was "reared in" and "slaughtered in". If animals were born, raised and slaughtered in the same country, then the label can simply state the "origin" country. German food retailers and their customers favor meat from animals that were born, raised and slaughtered in Germany. If that is not possible, they prefer at least that animals were reared and slaughtered in Germany. The new rules have already affected trade patterns since the import of live animals from Denmark and the Netherlands is expected to drop by nearly 10% in 2015.

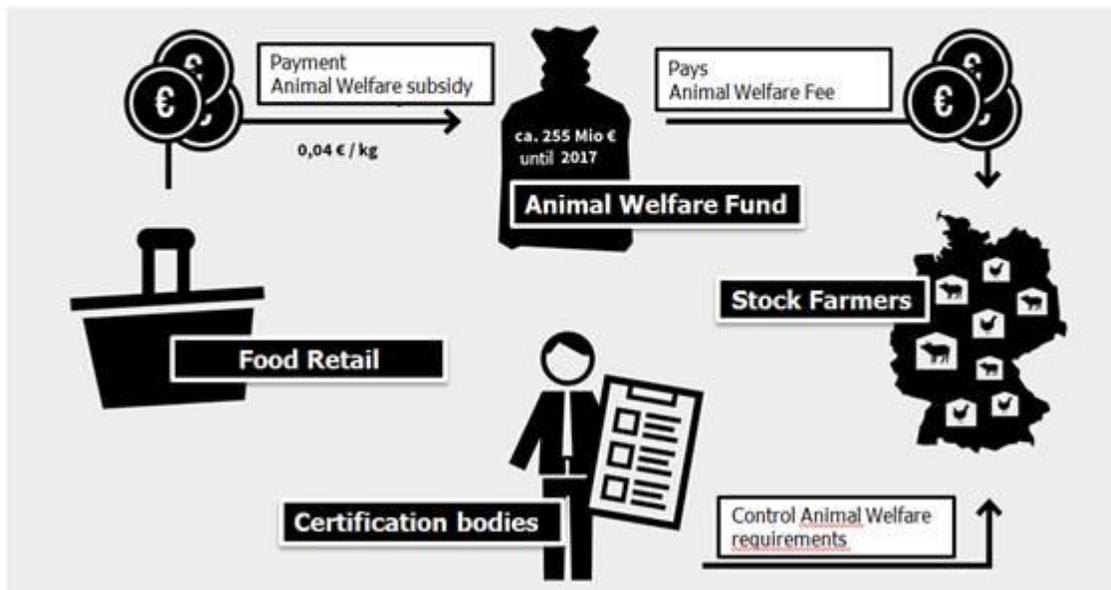
Voluntary Initiative by Farmers, Meat Packers and Food Retailers

A coalition of German agriculture, meat packers and food retail industries formed an alliance to respond to the ongoing criticism on animal husbandry in 2014. Polls have shown that a majority of German

consumers believe it's important to raise livestock and poultry humanely, in accordance with their nature as a species. But, the polls also have shown that just a minority of consumers were willing to spend significantly more.

All major retailers participate with a market share of about 85% of the German market. The retailers pay four cents per kilogram of sold meat or sausage into the fund. This refers to their entire sales amount - regardless of the proportion of deliveries from participating farms with higher animal standards and regardless of the current market price for meat. In total, food retailers pay around €85 million annually into the animal welfare fund. By the end of 2017, this should result in a total volume of around €255 million to pay farmers for voluntary improvements in the treatment of pork, turkeys and chickens. According to the initiative, the sum covered farms holding up to eight million pigs and 300 million chickens.

Basic Principle



Source: Initiative Tierwohl

Livestock farmers participate in the scheme on a voluntary basis. Farmers qualify for funding on condition that they meet basic livestock welfare standards, and then exceed those standards in specific ways that farmers propose themselves. The start of the industry initiative was called a success since more farmers applied than actually could participate. However, the initiative is drawing more and more criticism with in transparency, voluntariness and standards being too low the most important topics.

For critics, this initiative is not transparent as the customer cannot support the initiative since it's not

obvious for consumers which meat comes from participating establishments. There is no label for this initiative and there is none planned. Christian Meyer, the agricultural minister of Lower Saxony said, "This way, no choice and no reward for greater animal welfare by the consumer is possible". It was also criticized that the retailers have not been willing to increase funding since more farmers applied than could participate. Thus in January 2016, Joachim Rukwied, president of the German Farmers Union has demanded that food retailers should triple the amount to 12 cents per kilogram meat.

The voluntariness of the initiative also draws criticism. Animal welfare groups and consumer advocates say it's a popular tactic by the industry to do something voluntarily to prevent mandatory laws. For them, the requirements for participating farmers don't go much beyond existing legal regulations. From their point of view, the industry initiative is more about image and keeping current standards than real improvement.

For more information please see: [GAIN Report Animal Welfare Initiative](#)

Label by German Animal Welfare Federation

The German Animal Welfare Association introduced their animal welfare label "for more animal welfare" in early 2011. The label is for products of animal origin which can guarantee a real added value for animal welfare which go beyond legislation. The label was developed by the German Animal Welfare Association together with partners from industry, research and consulting initiative. However so far, the label has rather a niche character due to lack of consumer acceptance.

At the beginning of January 2016, Agriculture Minister Schmidt announced that he wants to merge the animal welfare efforts in Germany. He wants to fulfill the desire of the consumer for a uniform labeling of services connected to animal welfare. Thus, he seeks to combine the label of the animal welfare federation with the animal welfare initiative by the industry. Schmidt stated that he wants to create incentives so that uniform standards for animal welfare can be achieved. He added that he cannot regulate private initiatives and that he wants to avoid different labels and different animal welfare standards.

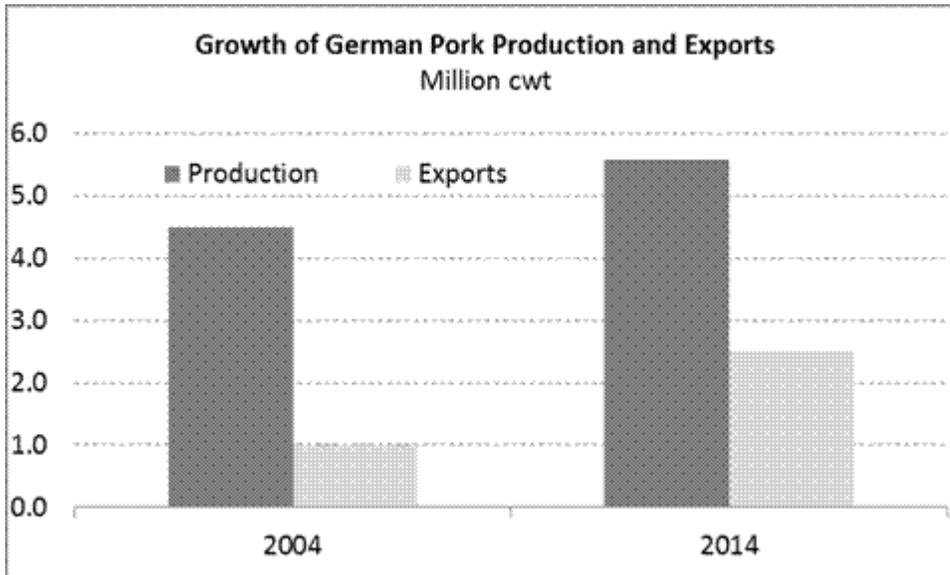
Goal of German Animal Welfare Policy

The German Government has different objectives with the improvement of animal welfare. Foremost, the initiative is designed to respond to public pressure fueled by the ongoing criticism of the Greens in German Parliament as well as by non-governmental organizations. Another aim is that farmers should continue to produce high-quality food in Germany with the jobs remaining in Germany. And, there is the hope that animal welfare can become a marketing argument for German food and that higher animal welfare standards will be valued as premium livestock products abroad resulting in more willingness for foreign customers to pay a higher price. Animal welfare has also become an important political topic in Germany and, in the run up to elections last fall 2013, the Green Party has made it a campaign issue. Since then, the Greens have been clearly in the driver's seat on animal welfare which left the governing coalition of CDU/CSU and SPD as well as the Left party as bystanders.

Potential Impact on Trade

Three trade-related aspects arise from the German animal welfare initiatives. First, within the EU, implementation of national standards prior to the EU puts German farmers at a cost disadvantage. And, the industry's ability to mitigate costs while still meeting new standards poses a challenge. Germany has

become a world leader in livestock production in the past decade. Fueled by exports, Germany's pork and poultry industry has expanded dramatically.



Source: FAS Berlin



Source: FAS Berlin

The second aspect is that pork and chicken exports have more than doubled in the past decade and the industry has become dependent on further growth on European and overseas markets since growth potential in Germany is limited. The majority of exports go to European markets with just limited potential for further growth. Strong competitors have emerged with pork from Spain and chicken from Poland. Consumers in Europe who are willing to spend more on premium pork or chicken buy either local or purchase known specialties such as “Iberico” pork from Spain or “Poulet Maïs Fermier” chicken from France. That means that the German pork and chicken industry is also dependent on overseas – non European – markets. Here, German companies compete strongly with Brazilian and U.S.

suppliers as well as other member states of the European Union. Also, the world market with its main growth taking place in Asia and Africa is driven by price. And, there is not much demand for a higher valued product based on animal welfare. So, currently it only seems to remain a distant hope that there is more than a niche market for premium German pork or chicken either on the European or overseas market.

Third, animal welfare has become really important to German consumers and in federal policy. Today, U.S. regulations and approaches to protecting animal welfare are already different from the EU's and Germany's, but overall both achieve similar results. There is the possibility that Germany will develop new regulations which doesn't follow international science-based standards. In the long term, new animal rights standards could become tomorrow's impediments to trade. In general, German consumers are not aware that animal welfare is also an important topic for U.S. producers and consumers. They do not follow the development of private science-based animal welfare guidelines and their implementation by most sectors of the U.S. livestock industry. For Germans, it comes as a surprise that the U.S. Animal Welfare Act was first signed into law 50 years ago in 1966.