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ANIMAL WELFARE AND MAJOR EUROPEAN FOOD RETAILERS

Peter Jones

Abstract

Animal welfare has become an important element in food marketing and large food retailers, who have a pivotal role in food supply chains and can thus influence patterns of both food production and consumption, have been increasingly emphasising their animal welfare policies in their retail offer. However, food retailers' approaches to animal welfare, have received relatively little attention in the academic literature, and this chapter looks to further contribute to this work by reviewing, and reflecting on, how some of the European Union's leading food retailers have addressed animal welfare. The findings suggest that six themes, namely, strategic corporate commitments; general and specific, policies on animals and animal food products; supply chains; labelling; inspections and audits; and cross-industry initiatives; collectively captured and illustrated the food retailers' approach to animal welfare. Further, a number of other issues about the food retailers' approach to animal welfare including the aspirational nature of their commitments, the efficacy of audits and labelling, the role of animal welfare pressure groups and campaigns, and the impact of COVID-19, are also discussed.

Introduction

Animal welfare is an important element in food marketing (Buller 2018), and large food retailers, who have a pivotal role in food supply chains, and can influence patterns of food production and consumption, have been increasingly emphasising their animal welfare policies in their retail offer. The food retailers' position on animal welfare is generally seen to be part of their approach to corporate social responsibility, and while corporate social responsibility in food retailing has received considerable attention in the academic literature during the past two decades (e. g. Jones et al. 2005; Anselmsson and Johannsson 2007; Souza-Monteiro and Hooker 2017; Pulker et al. 2018; Fernandes-Perrin 2021), food retailers' corporate policies on animal welfare have received very limited attention in that literature.

Animal welfare is concerned with the general health and wellbeing of animals. More specifically, the American Veterinary Medical Association (2010, webpage) suggested that an animal is seen to be in '*a good state of welfare if it is healthy, comfortable, well-nourished, safe, able to express innate behavior, and if it is not suffering from unpleasant states such as pain, fear, and distress.*' In many ways, animal welfare revolves around the belief that animals are sentient beings, namely, that they feel or perceive things, and that consideration should be given to their physical, emotional, and behavioural well-being.

Animal welfare is certainly and increasingly emotive topic and while some voices emphasise what they see as the positive role of animal experimentation in increasing food supplies and in developing new and better medicines, others stress the vulnerability, and the suffering of animals that are used for commercial entertainment, for animal experimentation in scientific and medical research, and express concerns about the treatment of animals in modern intensive agricultural/food production systems. In the UK, for example, Animal Rising (2023, webpage), an animal rights activist organisation that look

to put the *'treatment of animals in the spotlight'*, received high profile nationwide publicity in April 2023 when they tried to disrupt the Grand National, perhaps the country's best-known horse race. In October 2022, Animal Rebellion, another animal rights group, poured out milk in two high class London department stores in a protest against the use of dairy products.

The European Commission's Retail Forum for Sustainability (2014, webpage) recognised that recent decades had witnessed *'a significant evolution in farming and food production from which consumers are increasingly far removed and disconnected'*, while more positively, EuroCommerce (2017, webpage) claimed *'retailers have led the drive for animal welfare improvements'*, that *'retailers and wholesalers are sensitive to consumer demand for higher welfare products, thereby developing markets and rewarding producers that go beyond minimum legal requirements'*, and that *'retailers and wholesalers work closely with farmers to ensure animals are raised with high standards of animal health and welfare.'* Many European countries, including Germany, Poland, Italy, France, and Spain have high levels of meat consumption per capita (Statista 2021). Given the long-standing concentration of food retailing within Europe (European Commission 2014), the large food retailers play an important role in meeting consumer demand for beef, pork, lamb, and chicken, and for milk and dairy products.

The aim of this chapter is to explore, and reflect on, how some of the leading food retailers in the European Union have reported on their approach to animal welfare in their animal welfare statements and policies, and thus to make a small contribution to filling the gap in the academic literature referred to above. The chapter includes a description of the characteristics of animal welfare, a short literature review, an outline of the relevant theoretical background, an investigation into how some of the leading food retailers in the European Union have approached animal welfare, a reflective discussion of their approach, and a conclusion which summarises the main findings, outlines the chapter's limitations, and offers some suggestions for future research.

Literature Review

Snyder (2019) argued that previously published relevant literature is essential for all research disciplines, not least that it enables the author(s) to map out, and assess, the research area. More specifically, Snyder (2019) identified three approaches to literature reviews, namely, systematic, semi-systematic, and integrative. The semi-systematic approach was adopted in this paper because it is deemed useful for detecting overall themes, and where there are broad research questions. In conducting the current literature review, the author employed Google Scholar in April 2023, and used animal welfare and retailing as the key terms in the search process. In selecting papers for the review, the author was guided by his own judgement of the relevance of the paper to the aims of the current study, and a desire, where appropriate, to reflect recent work.

The search process, revealed that food retailers' approaches to animal welfare had received some attention in the academic literature, but that some of this work was dated. Some 20 years ago, Lindgreen and Hingley (2003) examined the approach taken by Tesco, the UK's largest retailer, to deal with consumers' concerns about animal welfare, and they revealed that the retailer had worked with its suppliers in an attempt to address such

concerns. However, in Hubbard et al.'s (2007) examination of the attitude of pig farmers in the UK to improved farm animal welfare standards, it was suggested that farmers believed that the retailers' interest in animal welfare was superficial, with animal welfare being perceived as a marketing tool to promote a caring public image of the retailer. In a similar vein, Velarde and Dalmau (2012, p. 244) acknowledged that retailers increasingly recognised that consumer concerns *for 'good animal welfare represent a business opportunity that could be profitably incorporated into their commercial strategies.'*

More recently, in a comparative study of farm animal welfare policies in France and Germany, Vogeler (2019) found that retailers were playing a leading role in rising to social concerns about the welfare of farmed animals by introducing animal welfare labels and purchasing guidelines. However, Vogeler (2019) also argued that while food retailers played an increasingly important role in setting farm welfare standards, this posed two sets of challenges. Firstly, that the focus was on retailers setting standards that look to satisfy consumers' expectations, whereas the focus should primarily be on the way farmed animals are treated, and secondly that this can also cause problems for farmers in that if they have to meet retailers' changing demands, then they may be unable to pursue advance planning programmes. More generally, the author suggested that although the state has often been seen to play a strong role in agricultural policy, market-based governance was playing an increasingly important role in animal welfare.

Schulze et al. (2019), looked to explore how food retailers were motivated to take on the marketing of products with increased animal welfare standards, and their findings suggested that a focus on animal welfare can not only achieve more successful marketing, but can also help both consumers and farmers to change their consumption and production habits. In a study of the costs and benefits of improving farm animal welfare, Fernandes et al. (2021) reported that some European retailers had begun to pursue transparency around animal welfare, and that such initiatives could be pursued to enhance animal welfare and to promote continuous improvement. Perhaps less positively, Jones and Comfort (2021) found that some UK food retailers' approaches to animal welfare were both aspirational and expectational. Aspirational in that the food retailers expressed a desire to improve animal welfare, and expectational in that they expected their suppliers to effectively take responsibility for complying with their standards and requirements.

Having noted that the limited research on how grocery retailers look to reorient the market for animal welfare, and highlighted the ways industry and non-governmental organisations influence retailers' assortment and merchandising decisions, Ejsberg et al. (2022) focused on how retailers in Denmark, Sweden and Germany, view the market for animal welfare, and on how they work with their assortments to influence customer behaviour and to position themselves as good corporate citizens on animal welfare. The authors concluded that while retailers have significant agency concerning how products are promoted in their stores, they are subject to the structural constraints of the value chain, and that promoting animal welfare requires the close collaboration, and dedication, of all major stakeholders within that value chain.

de Boer and Aiking (2022) argued that the degree to which consumers are exposed to animal welfare issues may vary significantly because food retailers (and food producers)

have adopted two contrasting positions in the marketing of food products. Here the argument was that on the one hand there is an ongoing process to de-animalise animal products by hiding their origin, while on the other hand, though on a much smaller scale, there are initiatives to highlight the sustainable farming of animals taking place within a natural, healthy environment. Muhammad et al. (2022) noted that many retailers worked with suppliers and set farm animal standards within their contracts with their suppliers, but argued that many of these standards were primarily aimed at delivering good animal welfare through minimising negative welfare, rather than promoting positive welfare.

Theoretical Background

On the theoretical side, Veit and Browning (2021, webpage) outlined *'three primary theories'*, on animal welfare, namely *'biological functioning, natural living, and affective state'*, which could be combined into *'a perspectival pluralist account of animal welfare'*, but their approach does not help to position animal welfare within a business context. Here, work on corporate social responsibility seems to offer a way forward. Although Garriga and Mele (2014, p. 51) suggested that corporate social responsibility *'presents not only a landscape of theories but also a proliferation of approaches, which are controversial, complex and unclear'*, two sets of theoretical approaches are relevant, to the present study.

Firstly, stakeholder theory emphasises that the focus of corporate social responsibility is on meeting the needs of all a company's stakeholders, including the company itself, customers, employees, suppliers, and society at large. Gavare and Johansson (2010), for example, argued that companies must be sensitive to the needs and concerns of a wide range of stakeholders. Secondly, there have also been attempts to develop arguably more radical theoretical approaches which seek to locate corporate social responsibility within wider economic, political, and social structures. Castro (2004), for example, looked to develop a more critical approach and argued that economic growth relied on the continuing exploitation of both natural and social capital. Hanlon and Fleming (2009, p. 938), suggested that corporate social responsibility is an *'ideological smoke screen designed to either soften the image of firms engrossed in the rampant pursuit of profit (at any cost) or as a way to deflect attention away from an unsavoury core business model.'* Some social scientists, (e. g. Springer 2010) see neo liberalism shaping contemporary political, economic, and social policy processes by emphasising free market mechanisms, a minimal role for the state, and the increasing importance of both corporate and individual responsibility.

Methodological Approach

In looking to undertake an exploratory review of how the leading food retailers within the European Union have publicly addressed animal welfare, the author chose a simple method of enquiry, which he believed to be fit for purpose. Seven of the leading food retailers, based on revenue (Statista 2022 and Retail Index 2022) within the European Union, namely, Aldi, Ahold-Delhaize, Edeka, Rewe, Carrefour, Casino, and Auchan were selected for study. These retailers were selected because a preliminary Internet survey revealed that they had all posted animal welfare statements and policies, which provided insights into their approach to animal welfare, on their corporate websites. This chapter

looks to provide an exploratory review of how the selected European food retailers publicly addressed animal welfare, rather than a systematic or comprehensive analysis of animal welfare issues within European food retailing.

Aldi is the company brand name of two German multinational companies trading from over 12,000 discount stores in some 20 countries. The company, established in 1946, operates as two separate groups, Aldi Nord, headquartered in Essen, and Aldi Sud, headquartered in Mulheim. Ahold-Delhaize is a Dutch multinational retail and wholesale company. The company operates supermarkets, hypermarkets and convenience stores from some 6,500 outlets across 10 countries. Edeka is a leading German retailer and the 4,000 stores that operate under its banner, include, hypermarkets, supermarkets and local convenience stores. Rewe is a retail and tourism co-operative based in Germany and it trades from over 12,000 supermarkets and convenience stores, principally in Germany and Austria, but also across 10 other European countries. Carrefour, established in 1958, is a French multinational retail and wholesale company, and it trades from over 12,000 hypermarkets, supermarkets, and discount stores in over 20 countries. Casino, established in 1898, is a French retail company and it operates from some 11,500 stores, and trades in four Latin American countries and in Cameroon, as well as throughout France. Auchan, established in 1961, is a French multinational retail company, and it operates hypermarkets, supermarkets, and convenience stores, from some 2,000 locations in France and ten other countries.

The information for the chapter was generated by an Internet search conducted using the name of each of the selected food retailers and animal welfare as the key phrases. The search was undertaken in June 2022 using Google as the search engine. The most recent animal welfare statements and animal welfare policy statements on each of the selected food retailers' corporate websites provided the empirical information for this chapter. These statements tended to follow a similar pattern and focus on a similar series of issues, and the author was guided by such similarities in identifying a number of themes, as outlined below, that illustrated the selected food retailers' collective approach to animal welfare. The chapter draws on quotations from the selected food retailers' corporate websites. The aim here, was to explore the ways the retailers publicly expressed, and evidenced, their commitment to animal welfare, and the author took the view that this was best captured in the retailers' own words, not least in that quotations could convey the corporate authenticity of the findings and offer greater depth of understanding (Corden and Sainsbury 2006). These animal welfare statements and animal welfare policies are in the public domain on the Internet, and the author took the considered view that he did not need to contact the selected food retailers to obtain formal permission prior to using the information.

Findings

All the selected retailers posted animal welfare statements and policies, which provided insights into on their approach to animal welfare, on their corporate websites. However, rather than describing each individual retailer's approach, the aim was to identify, and draw out, a number of themes that illustrate their collective approach to animal welfare. More specifically, six themes were identified, namely, strategic corporate

commitment; general and specific, policies on animals and food products; supply chains; labelling; inspections and audits; and cross industry initiatives; which effectively capture, and illustrate, how the selected retailers are addressing animal welfare.

Strategic corporate commitment was articulated in a variety of ways. Aldi (2019, webpage), for example, emphasised that its *'commitment to animal welfare is based on our understanding of quality and responsibility as well as the fact that we offer a large number of animal-based raw materials and products'*, and *'for this reason, we aim to promote more humane and sustainable husbandry conditions in livestock farming at a large scale.'* Carrefour (2020, p. 2.) claimed that the company had *'been developing a programme to improve animal welfare throughout its supply chains'* for several years. In a similar vein, Edeka (2021, p. 26.) reported it had been *'campaigning for many years for improved animal welfare and greater transparency in the product range'*, that the company was committed *'to achieving additional improvements in farm animal husbandry conditions in Germany'*, and to *'the adoption of improved practices for animal husbandry for meat, sausage and milk.'*

Casino (2021, webpage) argued that animal welfare was a *'key issue'* for the company to enable it *'to live up to its ambition of enabling better and more reasonable consumption'*, that *'being able to consume products which are more respectful of animal welfare from the beginning until the end of their lives is a strong request from many customers'*, and for that reason, the company *'need to take part in improving cattle breeding practices, transport and slaughtering.'* Ahold-Delhaize (2021, webpage) claimed to *'be a passionate supporter of the well-being and welfare of farm animals'*, that *'not only is it a good business practice, as our customers expect and rely on us to do the right thing'*, that *'we truly believe supporting animal welfare is the right thing to do'*, and that the company *'acknowledges animal consciousness, understanding they feel pain and experience emotions.'* Rewe (2019, p. 12) claimed *'we are committed to species-appropriate and animal-friendly husbandry systems.'*

The majority of selected retailers outlined their general animal welfare policies as well as their policies on specific animal groups and associated food products. Carrefour (2020, p. 2), for example, reported that its animal welfare policy, formally defined in 2019, embraced ten objectives, namely:

- *'combating antibiotic resistance and banning antibiotic growth promoters and growth hormones.*
- *banning cloning and genetically modified animals and seeking biodiversity.*
- *transforming cage rearing and keeping animal confinement to a minimum.*
- *keeping stress during transport and slaughter to a minimum.*
- *limiting controversial practices (castration, tail docking, beak trimming, etc.) and systematically optimising pain management.*
- *requesting proper nutrition.*
- *requiring health monitoring.*
- *banning animal testing (cosmetics, drugs and cleaning products).*
- *banning materials of animal origin not derived from livestock whose primary purpose is to produce food', and*
- *'improving comfort through living environment'.*

Rewe (2019, p. 12) reported basing its animal welfare policies on three *'focus topics'*, namely, *'husbandry conditions'*, *'animal integrity'*, and *'breeding methods.'* In addressing husbandry conditions, for example, Rewe (2019, p. 11) argued that *'the husbandry environment and conditions are decisive for the well-being of farm animals'* and that the company was *'committed to adapting the husbandry and management systems of farm animals as best as possible to the animals' needs from birth to slaughter and to meet the behavioural physiological demands of each species.'* The company's focus on breeding methods features *'long-term approaches to breeding methods and breeds that are targeted to better animal welfare'* (Rewe 2019, p. 14). Ahold-Delhaize (2021) outlined its general policies on animal testing, growth promoters, live animal transport and slaughtering, antimicrobials, and close confinement. Here, the company explicitly acknowledged that farm animals are especially vulnerable to stress during transport and slaughter, for example, and reported that it looked to *'limit live long-distance transport of farm animals across all species'*, and to ensure that *'animal-based products come from farm animals that have been rendered unconscious and insensible to pain before harvest through effective stunning in a single attempt'* (Ahold-Delhaize 2021, webpage).

A number of the selected retailers had policies towards specific animals and animal products. Auchan (2019), for example, reported on its commitment to ensuring that all eggs sold in countries within the European Union were from cage-free hens by 2025. In other countries, the company reported that it had made *'the pragmatic decision to engage in ethical discussions with the farmers and non-governmental organisations of each country. The objective is to support the process and to progressively replace industrially farmed eggs with cage-free eggs within a proactive and realistic timeframe'* (Auchan 2019, webpage). Aldi (2021, webpage) reported that since 2015 it had paid a dividend for each kilogram of pork sold in its retail outlets to an animal welfare initiative programme which supports farmers who implement defined animal welfare criteria. The company also reported having been in the process of phasing out the majority of fresh pork products manufactured from castrated animals since 2017.

The selected food retailers clearly recognised the importance of their supply chains in addressing animal welfare. Rewe (2019), for example, identified animal welfare as one of the risks in supply chain management, and emphasised the importance of transparency along the transport chain in enabling the company to identify, and where possible avoid, or directly address, any transport risks to animal welfare. As a first step in this process, Rewe claimed to have increased, where required, transparency along the supply chain for its private label products. Aldi (2021, webpage) emphasised *'we make our supply chains transparent'*, and *'we demand that the origin of our food products be completely traceable as this forms one of the key aspects in promoting improved animal welfare.'* More specifically, Aldi requires all its German suppliers of fresh meat products to participate in an inspection scheme, which defines compulsory requirements for each stage in the supply chain, including animal feed producers, farms, slaughterhouses, and meat processors.

Casino (2021, webpage) emphasised its *'commitment in favour of animal welfare as regards supply chains and offers in stores.'* This commitment looks to embrace the *'regular control of cattle breeding and slaughtering conditions'*, and *'developing the product offer with best standards in favour of animal welfare.'* Casino (2021, webpage) also emphasised its commitments to specific animal sectors which, for example, embraces *'improving standards of animal welfare in the chicken sector'*, *'supporting the breeding of laying hens*

outside cages, *'promoting the sale of milk from cows with access to pastures between 3 and 6 months a year'*, and *'improving living conditions for rabbits.'*

Food retailers increasingly see labelling as an important element in improving information on animal welfare for customers. Rewe (2021), for example, has a four-level approach to the labelling of animal husbandry methods. The first level recognises that the husbandry method meets legal requirements, or an equivalent standard, for level 2 the husbandry method meets higher welfare standards, for example, at least 10% more space for animals, while level 3 indicates more space for the animals and outdoor exposure, and level 4 indicates even more space and free-range access for the animals. At that time, the long-term goal for Rewe (2021, p. 9) is that all its own brand fresh meat products originating from beef, pork and poultry are classified at least in level 2, and doubling the proportion of products classified in levels 3 and 4, *'as far as economically sensible and feasible in regulatory terms.'*

Casino (2018, webpage) reported working with three animal protection organisations to launch France's first animal welfare labelling initiative. The company claim that *'these labels enable customers to choose products which are more respectful of animal welfare.'* Aldi's (2019, webpage) reported that its *'Fair and Good'* own brand animal welfare label has a twin focus. On the one hand, products bearing the label exceed the statutory requirements and are produced under improved animal welfare related conditions. On the other hand, the supplier contracts secured under the label are used to provide a means of support for farmers who are required to put in work, for example, in erecting new, or larger, stables and pens and in providing additional outside areas for roaming. Aldi's (2019) Fair and Good label also includes a range of pork products where the husbandry methods provide pigs with twice the legally stipulated space per animal, access to outside areas, and straw as additional animal feed.

Many of the selected food retailers reported their commitment to auditing designed to help to monitor and improve animal welfare. Aldi (2019, webpage), for example, reported *'we commission auditors of independent accreditation bodies to conduct the relevant audits.'* More specifically, independent on-site audits include *'a review of husbandry, feeding, farm and slaughter house accommodation, transport, and stunning conditions, as well as other species-specific requirements'* (Aldi 2019, webpage). The company also reported its commitment *'to conduct our own audits or commission third parties to perform random audits'*, covering verifying compliance with the requirements of its animal purchasing policy, but that the *'use of caged eggs for processed food products'*, *'the castration of piglets'*, *'the slaughtering of pregnant cows'*, and *'forced feeding practices for geese and ducks'*, are excluded from such audits (Aldi 2019, webpage).

Rewe (2019, p. 24), reported that *'in order to achieve improvements in livestock husbandry'*, the company *'is committed to extensive and regular inspections'*, and that the company *'conducts its own audits and cross audits, with independent institutions in agricultural holdings, in slaughterhouses, and in processing plants.'* Further, Rewe (2019, p. 24) also reported that *'in the event of intentional gross disregard'*, of its animal welfare policies, the company *'reserves the right to impose penalties or to terminate the business relationship.'* Casino (2021, webpage) emphasised that the *'control plan'* in its approach to *'regular control of cattle-breeding and slaughtering conditions'*, relied on *'an audit reference*

matrix on animal welfare in slaughter houses', and that 'these audits are also carried out regularly regarding cattle breeding.'

Finally, a number of the selected retailers emphasised their commitment, and contribution, to partnerships and cross industry initiatives designed to secure and enhance animal welfare. Aldi (2019), for example, listed a number of animal welfare partners, including, the German Animal Federation, Fairfarm, Tierwohl, and the Association for Controlled Alternative Animal Testing. Tierwohl, for example, looks to promote improvements in animal welfare in pig, chicken and turkey husbandry, in collaboration with farmers, the meat processing industry, and retailers. Here the additional expense incurred in enhancing animal welfare by farmers and meat processors is financed by all the participating food retailers. Fairfarm, concentrates on enhancing husbandry for fattening pigs, and all participating farmers have to provide 100% more space than legal requirements, as well as open pens or access to outdoor areas.

Carrefour (2020) reported on three of the company's joint initiatives and partnerships. The slaughterhouses that supply Carrefour's own brand products are audited by OABA, a specialist animal rights association, and the company has joined with LIT Questerel, a regional innovation laboratory, which has links with a wide range of stakeholders in the agricultural and agri-business sectors, as well as research and animal protection organisations. Carrefour has also been working with a range of animal protection organisations in Brazil, Romania, Italy, Poland, Spain and Taiwan. Ahold-Delhaize (2021) reported on its participation with a range of animal welfare organisations on antimicrobial use and mortality rates.

Reflective Discussion

The findings reveal that the selected European Union food retailers addressed animal welfare, and looked to evidence their commitment to it, in a variety of ways, but two themes, namely a simple summary analysis of the main findings, and some wider reflections on them, merit attention. A simple analysis of the findings suggests a number of issues. In explaining their strategic commitment to animal welfare, the food retailers suggested that such a commitment reflected a longstanding corporate commitment to good business practice, and/or increasing customer concerns about animal welfare. At the same time, while the selected retailers were often at their most emphatic in emphasising their commitment to animal welfare, some of the claimed commitments are aspirational, in that included future targets for the improvement of animal welfare, and expectational, in that they relied on their suppliers to deliver on welfare standards. Setting animal welfare standards for suppliers certainly seems to reflect the food retailers' recognition of the vital role their supply chains are expected to play in securing animal welfare. Here, many of the food retailers emphasised the importance of the auditing of suppliers in an attempt to secure the required standards of animal welfare.

Such a summary analysis aside, the findings raise other wider issues. As major food retailers look to increase their commitments to animal welfare, and in so doing make growing animal welfare demands on farmers in their supply chains, so farmers and retailers may increasingly have to look to introduce new technologies into their operations. More specifically, Ufer et al. (2019), for example, explored increasing consumer demand for animal welfare and biotechnology in livestock applications. While Buller et al. (2020)

recognised that the physical or behavioural features of animal welfare can now be measured at the farm level, they also claimed that digital revolution in agriculture opened up the possibility of quantify animal welfare using multiple sensors and data analytics, and enabled the daily monitoring of animal welfare at the individual animal level. However, both farmers and retailers may have to incur the increased costs associated with such developments. Fernandes et al (2021, webpage) suggests that *'many of these costs are obvious'*, relating, for example, to *'training of stockpeople, reconfiguration of pens, and the administration of pain relief'*, but that *'other costs are less obvious.'* Here, such costs may include *'substantial risks to market protection, consumer acceptance, and social licence to farm, associated with not ensuring good animal welfare'* (Fernandez et al. 2021, webpage).

Many large food retailers have global reach and source animal products across extensive geographical areas, and fulfilling their animal welfare commitments can present complex challenges across their global supply chains. These challenges are all the greater not only because there may be different attitudes towards animals and animal welfare in different countries, but also because the food retailers' commitments to animal welfare are at least one step removed from their own operations. As such, the retailers' dependence on their suppliers, reduces their direct control over animal welfare standards.

Here a major element in the selected retailers' approach to animal welfare is their dependence on regular independent auditing of animal welfare standards and conditions at their suppliers. However, in examining consumer concerns about food safety and animal welfare, Haggarty (2009, p. 767) challenged the independence of the audit process, and argued that under neoliberal schemes, audit-based governance is effectively shaped by the food industry itself, and that *'grocery marketers translate consumer preferences into checklists of acceptable farming practices in negotiation with farming sector lobbies, consumer groups, and other participants in agri-food systems.'* In reviewing the role of *'audit in animal welfare'*, Escobar and Demeritt (2016, p. 171) highlighted the general *'tendency for audit processes to become decoupled from the qualities they are meant to assure.'* More specifically, LeBaron et al. (2017, p.961) argued that *'retail and brand companies shape the audit regime in ways that legitimate and protect their business model.'* As such, there is the danger that the audit exercises which the some of the leading European food retailers claim as a major feature of their corporate commitment to animal welfare, become a routine reporting end in themselves, rather than a means to an end.

Food retailers, and the food industry more generally, face increasing pressure, both from animal rights groups, and from the public, about animal welfare. Eurogroup for Animals (2022), for example, an animal protection lobby group based in Brussels, identified work on farm animals as its largest programme. More specifically, Eurogroup for Animals (2022, webpage) reported *'staggering numbers of animals still kept in close confinement'*, that *'long distance live export for certain species is increasing, including particularly vulnerable animals such as unweaned calves'*, and that *'the international trade of meat products is stalling progress on animal welfare legislation at EU-level, because animal welfare standards are lower in countries with which we have trade agreements.'* Further, Eurogroup for Animals (2022, webpage) claimed that *'there is a widespread lack of enforcement of existing animal legislation within the EU, with patent examples, being the Pig Directive and the Transport Regulation, but with serious problems also identified in enforcing the Broiler Directive and in protecting animals at the time of slaughter.'*

Although labelling is often seen as an important element in communicating with customers about improvements in animal welfare, doubts have been expressed about the efficacy of labelling schemes. A report by the European Commission (2022, webpage) found that *'the extent to which animal welfare labelling schemes offer a significant improvement in the lives of animals is difficult to assess precisely'*, and that *'establishing a clear and direct link between animal welfare improvements and labelling schemes was challenging.'* More specifically, the European Commission (2022, webpage) reported that *'consumers' understanding of farming and of the functioning of labelling schemes'* was low, and that *'consumers indicated they would trust labelling schemes owned and managed by Non-Governmental Organisations and European Union public authorities more than if they were managed by national public authorities and food business operators.'* Further, the European Commission (2022, webpage) claimed that multi-level labelling schemes, such as the one employed by Rewe outlined earlier, was unlikely to *'provide major improvements at a large scale, as most of the adherents to the scheme complied only with the lowest level.'*

Following a survey of over 2,000 consumers drawn from four European Union countries, Ingenbleek and Krampe (2022) reported that many customers had a variety of doubts, relating for example, to consumers' trust in labels, confusion about the meaning of labels, and the proliferation of labels within the market place, and concerns about the effectiveness of animal welfare labels. Outside of Europe, in a study of poultry welfare in Australia, Parker et al. (2018, p. 238) found that *'labelling for consumer choice was not enough to address public concerns'*, that *'higher welfare labelled products represent at best a small incremental improvement in health and productivity for the animals behind the label'* (p. 240) and perhaps most telling of all, *'if animal welfare is left to the market, however, there is a real danger that misleading conduct and welfare washing will be rife and that the need for more creative and innovative solutions for better welfare in animal agriculture will be sidelined'* (p. 243).

At the time of writing, it is impossible to consider food retailers' approaches to animal welfare without some reference to COVID-19, not least because the pandemic has disrupted global supply chains and changed consumer habits and behaviours. On the one hand, the closure, albeit temporarily, of many abattoirs and meat packing and processing plants, widely reported in the trade press to be COVID-19 hotspots, and restrictions on international trade, disrupted many traditional food supply chains. On the other hand, public fears and concerns about the COVID-19 pandemic, about the claimed tracing of its origins to a wholesale food market in China, and about the reported incidences of high levels of the virus amongst people working in food processing and packing plants in a number of countries, heightened consumer awareness about the safety of animal products within food supply chains. In the face of such concerns, large food retailers may increasingly invest in enhanced biosecurity, possibly at the expense of existing animal welfare standards, whilst also looking to respond to new consumer demands by increasingly carrying alternatives to meat and animal-based products as part of their food offer.

Looking to such alternative futures, Plant Based News (2020, webpage), a media outlet producing content about veganism and plant-based living, for example, suggested that *'with growing concerns about food safety in light of the COVID-19 pandemic and estimates that three out of every four new or emerging infectious diseases in people come from animals, it's about time that food companies ramped up their efforts to prevent the spread of such diseases.'* Further Plant Based News (2020, webpage) claimed that *'the*

immune systems of animals raised on lower welfare factory farms are far weaker than any other; couple this with the immense overcrowding seen on these intensive farms - where some 90 percent of farmed animals are raised - and the risk of contracting and spreading dangerous diseases is worryingly high.'

Finally, this exploratory review of the selected food retailers' approach to animal welfare also has some implications for the theoretical positions mentioned earlier. On the one hand, within the context of stakeholder theory, the findings suggest that the leading food retailers increasingly recognise the importance consumers attach to animal welfare. At the same time, the findings also raise questions about if, and how, food retailers will accommodate animal welfare pressure group campaigns, within their animal welfare policies. On the other hand, critical conceptual approaches, based in political economy, which stress that current business models rely on the exploitation of natural capital, strike a chord with the strident criticisms of animal welfare within the retailers' supply chains, voiced by animal rights groups. In a similar vein, Hannon and Fleming's (2019) argument that the leading food retailers' commitments to animal welfare are but a smokescreen to draw attention away from what critics would see as their unsavoury business model, certainly resonates, as do neo liberal theories that emphasise the growing importance of the retailers, rather than governments, taking increasing responsibility for animal welfare.

Conclusions

This chapter has provided an exploratory review of how some of the European Union's leading food retailers have publicly addressed animal welfare, and as such, adds to the limited academic literature on food retailers' animal welfare policies. The selected retailer's collective approach to animal welfare was effectively captured by six themes, namely strategic corporate commitment; general and specific, policies on animals and food products; supply chains; labelling; inspections and audits; and cross industry initiatives. Although the selected retailers were seen to be at their most emphatic in expressing their commitment to animal welfare, some of the retailers' claimed commitments were aspirational and expectational, and the author rehearsed concerns about the nature of the auditing process in supply chains, the role of animal welfare pressure groups, the efficacy of labelling schemes, and the continuing impact of the COVID-19 pandemic. If the large food retailers' emphatic commitments to animal welfare ultimately prove to be flawed, then intensive methods of production may continue to dominate many farming practices.

A number of implications for food retailers, arise from the findings reported earlier, and from the discussion of these findings. These implications concern the efficacy of auditing and labelling, the introduction of digital technologies, the growing pressure from animal welfare organisations, and marketing. The food retailers may need to introduce more rigorous and genuinely independent auditing, if they are to fulfil their commitments to animal welfare. Given the range of concerns outlined above about animal welfare labelling, the food retailers may be advised to explore the feasibility of collaborating amongst themselves, and perhaps more importantly with non-governmental organisations, to develop a general animal welfare labelling scheme. The digital technologies may offer a range of opportunities to monitor animal welfare much more closely within supply chains. Large food retailers, either individually or collectively, may also look to open up constructive

dialogues with animal welfare pressure groups and organisations. More generally, the food retailers' commitments to animal welfare can be seen to be consistent with Schulze et al.'s (2019) findings that a focus on animal welfare standards can help food retailers to pursue more successful marketing. If the food retailers are to successfully integrate animal welfare into their marketing strategies, then their achievements in securing the welfare of the animals in their supply chains will need to be more demonstrably transparent.

This review has a number of limitations. The empirical material on which it is based was drawn exclusively from the corporate websites of a small number of the European Union's leading food retailers, at a fixed point in time, and does not include any primary information supplied by retail executives, managers or employees, or any information obtained from suppliers. However, the author believes this approach is appropriate in what is an exploratory review, that the chapter makes a small contribution to an area that has received limited attention to date in the academic literature, and that it may provide a platform for future research into the food retailers role in animal welfare.

Here, a number of potential research opportunities into food retailers approaches to animal welfare merit attention. At the corporate level, for example, research may help to increase understanding not only of why, but also of how, major food retailers develop their policies on animal welfare, and of how they look to elicit stakeholders' opinions, and of how they take account of animal rights pressure group campaigns in formulating such policies. Research into how animal welfare concerns inform the relationships between the leading food retailers and their suppliers, and on the locus of power within such relationships, also offers a potentially fruitful area of enquiry. At the same time, research on if, and how, more explicit, and verifiable, animal welfare policies affect profit margins, stock market performance and reputation, will inform understanding of the workings of potentially new business models within food retailing.

At the operational and consumer level, many research questions arise, including, how the leading retailers have incorporated animal welfare policies into both general marketing messages, as well as into marketing messages at the point of sale, and if greater consumer awareness of a company's approach to animal welfare influences buying behavior and retailer patronage. At the same time, although the current chapter has explored large retailers' approaches to animal welfare, an examination of small and medium sized retailers' policies on animal welfare, would broaden the scope of this genre of work. More generally, a focus on exploring alternative ways of organising food retailing, possibly more communally at a local level, for example, and making it more accountable to animal welfare concerns, might provide valuable insights into the future of food retailing.

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