

Department of Agricultural Economics
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Consumer Concerns
about animal welfare and
the impact on food choice
**Literature review and
Policy aspects Italy**

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Mara Miele, Consumer Concerns about animal welfare and the impact on food choice Literature review and Policy aspects Italy, published by University of Pisa

Consumer Concerns about animal welfare and the impact on food
choice

Literature review and Policy aspects Italy

EU FAIR-CT 98-3678

Italy- 1st report

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November, 1998

Consumer Concerns about animal welfare and the impact on food choice- Italy

This national report deals with a literature review of Italian consumer concerns about animal welfare (Sub-task 1.1 and 1.2 of the work programme). The objectives are:

1. To provide a review of existing literature on consumer concerns on animal welfare and choice of animal based food products in Italy;
2. To identify policies towards animal welfare adopted in Italy;
3. To identify what consumers understand by animal welfare;
4. To identify strategies so far used by policy makers, producers of animal products, and retailers to address consumer concerns;
5. To identify the key research questions to be addressed in the final design of later stages of the project;
6. To identify potential problems which need to be addressed in the final design of later stages of the project;
7. To aid the design of the focus group discussion guide utilised in Task 2.

The review of the existing literature on consumer concerns about animal welfare and choice of animal based food products in Italy has the following sections:

- Introduction.
- Cultural change, which deals with objectives 2, 5, 6, 7.
- Consumers' perception of animal welfare, which deals with objectives 1,2,3,4.
- Regulation, which deals with objectives 2.

Introduction

The Italian literature on consumer concerns about animal welfare is very limited and mostly consists of few marketing researches done by private enterprises, or of specific inquiries done by Environment or Animal Rights/ Welfare Associations. On the contrary there is a wide literature on "Animal Rights" e.g. Arrigoni, A.(1998), Battaglia, L. (1997), Castiglione, S. (1997), Mannucci, A. (1997), Cagno, S. (1997).

Even though in Italy issues of animal welfare never represented a focus of attention for a broad public, during the last decade there are some clues of a growing general interest. One of

the reason very often quoted for a new attention to animal welfare and animal rights issues seems the growing number of households with pets. In Italy in 1996 there were about 52,4 millions of pets, and it has been estimated that almost 50% of the households have pets. The market for pet-food has reached the level of 1,218. Billions Itl. L., which represent 47% to the total pet market. This change can be traced by pointing to two main trends:

- a) It is growing the number of initiatives undertaken by animal welfare/rights movements for sensitising a broader public towards issues of animal welfare.
- b) It is growing the number of new products, both food and non-food items, that use the "animal friendly produced" image or labels for reaching a new segment of consumers.

Cultural change

Animal welfare campaigns

During the last ten years it has been intensified the number of campaigns against the commerce of fur coats, for closing zoos and banning the use of animals in circus shows, it is remarkably grown the number of public initiatives, with nation wide TV campaigns promoted by the government against dogs' abandonment (typical phenomenon at the beginning of each summer) and dogs' rearing for fights (Pit-Bull). In 1991 a new national regulation (L. n. 282/91) on stray dogs and cats and pets' rearing was approved, which has been followed by several more specific regional regulations on the same matter, and in 1993 there has been another important regulation, L. n. 473/93, which modified the article 727 of the Italian Penal Code, and declared that animal mistreatments is a crime punishable as violence towards "living organisms" instead of the previous definition of crime against "human moral". Moreover Italy has been the first EU country in which a specific regulation has been approved for students and researchers' "conscience objection" against vivisection (L. n. 413/93).

Among the most recent and relevant initiatives that dealt with animal welfare issues related to animals reared for food production it is worth mentioning:

- 1998, November 14th, Bologna: National Congress "Nel 2000 galline ovaiole ancora in gabbia?" (*Year 2000, eggs farmed hen still in battery?*) organised by LEGAMBIENTE with LAV for presenting a dossier on the methods of eggs farming hen.
- 1998, October 24th, Torino: National Congress "A 20 anni dalla Dichiarazione dei Diritti degli Animali" (*Twenty years after the Declaration of Animal Rights*). The purpose of the congress was a reflection on the cultural, scientific and legal changes and on the level of information on this topic after twenty years of the Universal Declaration of Animal Rights of Paris.

- 1998, June 20th, Torino: Launch of the campaign "Una vita senza carne" (*A life without meat*), organised by the LAV and other environment and animal rights movements. In that occasion there has been a long human-chain to support the campaign.
- 1998: MiPA (Minister for Agricultural Policies) campaign against consumption and fishing of the fish shell "datteri";
- 1997, October 4th : "Marcia per i diritti degli animali" (Animal Rights march), organised by LAV (Lega Anti Vivisezione, *Anti-vivisection league*) together with EAR (Europe for Animal Rights) held in Rome with 15,000 participants. In that day it has been presented a new law proposal for modifying the article n. 9 of Italian Constitution and to introduce the acknowledgement of rights of non-human individuals. A similar initiative has been undertaken by the LIDA (Lega Italiana per i Diritti degli Animali, *Italian league for Animal Rights*) that sent a recommendation to the President of Italian Republic, to the Prime Minister, to the Presidents of the two chambers of the Parliament and to the Minister of Health, the Minister of Environment and the Minister of Culture, a law proposal for updating the fundamental principles of rights and duties of Citizens of Italian Constitution.
- 1997, June, Chianciano Terme: Launch of the campaign against the methods of rearing geese and ducks for production and consumption of *foie gras*, during the XXI^o Congress of LAV.
- 1996, January, Torino: Congress "Agricoltura e zootecnia intensive: il caso emblematico dei vitelli a carne bianca" (*Intensive agriculture and animal husbandry: the emblematic case of white meat veal calves*) organised by LAV, by LegaAmbiente and by ASVEP (Associazione Culturale Veterinaria di Salute Pubblica - *Veterinary Cultural Association for Public Health*). The Congress is especially important for two main reasons: firstly it has been held in Piemonte, one of the regions in which is concentrated the production of calf veal with the veal crate system; secondly because the ASVEP has openly declared the veal crate system unacceptable for animal welfare reasons, but also for consumers' health and environment pollution. The same ASVEP in that day has launched a campaign for a new regional law in Piemonte, for regulation the production of veal calf.
- 1996, June 8th: The LAV launched the campaign "Vitella Carne Malata" (*Veal, Sick Meat*) in 89 towns and cities against the veal crate system and the consumption of veal. This campaign has been supported by several animal rights and environment movements; LAV has produced a video on the veal crate system, with the same title, and it has collected several thousands of citizens' signature.
During 1996, between March 1996 and June 1996, after the first information in Italy on the spreading of BSE in the English herds and the possible connection with the disease CJD in

human beings, there has been a massive information on the methods of production of meat, dealing with issues of human health and animal welfare. The quantity and quality of this information have been remarkably different from the initiatives mentioned above, first of all because the news has been extensively covered by the most important media (TV and Press), and because it has been delivered by journalists, public medical authorities and veterinarians not identifiable as animal welfare/rights supporters¹. The impact of this event, given the coverage and relevance that has obtained in the media, it has been extremely higher than the former initiatives.

New animal-friendly produced non-food items

- 1997, Firenze: Opening of a new shoe's store called "Vegetarian Shoes"²; this is a very small franchising chains with no more than 3 store in Europe. There are no leather shoes or bags, but only non-animal products, quality brands "Vegetarian Shoes", "Vegetalia" and "Birkenstock". It is targeted to a segment of young consumers and it is very successful. [<http://www.flashnet.it/vegetalia>].
- 1984, Catania: Opening of the first store of the chain "Body Shop". In 1998 there are 53 Body Shop stores in Italy, in the rest of the world 1594 [<http://www.bodyshop.com>]. The chain Body Shop has promoted or supported several campaigns for animal rights and environmental protection: the most important one "Save the Whale" in 1985, with Greenpeace; in 1989 promoted the campaign "Stop the Burn" for the protection of the rain forest in Brazil, in that occasion more than 2,6 millions signatures from consumers have been collected in the Body Shop stores and sent to the Brazilian government to take initiatives toward the deforestation. In 1991 Body Shop launched a campaign against testing on animals for cosmetics, in order to stop the proposal for an European regulation which would have allowed the testing of all "ready cosmetics" on animals. In 1998 Body Shop has joined 142 other companies in signing up to the International 'Not Tested on Animals'/Compassionate Standard for Animals, which sets criteria for the approval and promotion of cosmetics and household products as "cruelty-free" by animal groups and member societies of the European Coalition to End Animal Experiment. During the same year further progress has been made towards the company target to ensure that any remaining animal by-products used in their products are ethically sourced by the year 2000. In addition to ethically sourced lanolin in the Body Shop products,

¹ For a review on the media attitude in covering the BSE issue in Italy see: Miele, M., Brunori, G. and Parisi, V., (1996) "BSE in Italian Media", in AIR-CAT report on Consumers attitude towards meat proceedings of the workshop held in Clermont-Ferrand, France (April 19-20, 1996). Paris: MATFORSK.

² Firenze, Viale dei Mille, 26 b-r.

the company continue to increase the number of *Coulorings* make-up brushes with synthetic hair.

- News Release - November 16th 1998 - The Body Shop founder Anita Roddick was celebrating an historic triumph as the British Government announced an immediate end to all cosmetic tests on animals.

Reacting to the news Anita Roddick said:

"At last we can celebrate a great victory after 22 years of continuous campaigning. This is a triumph for The Body Shop, our staff and customers as well as our friends in animal welfare groups. Over the years millions of people have signed our petitions demanding a ban on the barbaric practice of testing on animals for the sake of human vanity. We have finally achieved it in Britain. But animal suffering knows no national boundaries. Now the European Union must impose the same ban.

The Body Shop will step up our campaign for a ban on animal testing on all cosmetics products and ingredients throughout the European Union. New amendments to the existing EU cosmetic rules gives the British government and Members of the European Parliament a fantastic opportunity to end these tests once and for all."

1. In Britain in 1997 over 1,300 animals were used in cosmetics tests - the majority on ingredients. 2. The Government's decision places the UK at the forefront of European nations on the animal testing issue. It follows the UK ban last November on cosmetic product tests. 3. The Body Shop do not test our products or ingredients on animals. Our policy is approved by leading animal groups internationally under the Humane Cosmetics Standard. We have campaigned for over a decade to ban cosmetic tests world-wide. In 1996 we presented a petition of over four million signatures to the EU demanding a ban on animal testing of cosmetics. 4. The 93/35 EC Cosmetics Directive regulates the marketing, labelling and safety of cosmetic and toiletry products and ingredients within the European Union (EU).

- A growing number of stores has started to offer natural cosmetics, non tested on animals: in 1997 the demand for this type of products represented 2% of the total demand for cosmetics and is growing quickly (Largo Consumo, n.7-8/1997: p. 40).

New animal-friendly produced foods

- 1997, Verona: the company BRIO has launched the first 5 organically produced meat-products (cured ham, salami) brand name "Antichi Contadini".
- 1997: the specialised shops chain "Il Sentiero" started to offer organically produced meat (AL n. 7-8, 1997).

- 1997: The market for meat substitutes like Tofu and Seitan represented 1.9% of the total organic products sales (AIAB, survey on a sample of organic specialised shops, AL, n. 7-8, 1997).
- 1997: The company Alitalia introduced 3 vegetarian menus; from 1992 the fast-train Pendolino started to offer a vegetarian menu; In the fall 1993 the Restaurant chain Autogrill (on Italian highways) started to offer about 10 snacks suitable for vegetarians and labelled with a green leaf.
- 1997-1999: Coop-Italia has started to offer an animal friendly reared poultry line with a special brand 'GranGallo'. The first results about sales in 3 regions (Emilia-Romagna, Toscana e Veneto) have been quite successful. The campaign for promoting these products will start in January- February 1999. Coop-Italia is also experimenting new techniques of rearing for introducing higher "animal welfare standards" in a specific scheme of production for pigs and veal calves. The 13th of October 1998 the Coop Adriatica (member of Coop Italia) has started a survey with a representative sample of consumers in 10 stores of its supermarkets chain on animal welfare in animal based foods.
- 1996: Uova "Antichi Contadini", first certified organically produced eggs.

The most important example of new animal based foods animal friendly produces are represented by:

- 1991: The company Ovopel, launched a new product, free-range eggs. With the brand name "Uova della Corte" Ovopel packages and distributes open-range hen eggs. In Italy they represent the first and only company that moved towards this type of products, by following the successful examples of the free-range eggs in the Northern European countries. Free-range is a vague definition, but specifically in the Ovopel open-range hen farms, 7 hens share an area of 1 sq., which means only 7,000 hens per 1000 sqm. [see picture]. The packaging is quite appealing and unmistakable for the consumer: a small blue box with the brand name Uova della corte Ovopel S.p.A. The choice of the special packaging (the only blue box among the most common white ones) is certainly one of the reasons for their success. Consumers' response to the new product: The total sale of the free-range eggs Uova della Corte during the first year of commercialisation was 10,422,968. The area of commercialisation is still limited to 6 regions in the Centre and North Italy (Lombardy, Emilia-Romagna, Piedmont, Veneto, Tuscany and Liguria). Since then there has been a constant growth in the demand for this product and the rate of growth has speed up specially since 1994: between 1994 and 1996 the sales have increased 100%, reaching the level of 50,000,000 eggs. Today the "Uova della Corte", that still represents the only case of free-range farmed hen eggs in Italy, represent the

5% of the total market for eggs. A Doxa survey in 1996, commissioned by Ovopel, based on direct interviews made with a sample of 691 consumers who were leaving from 44 retail distribution centres shows that 51% of the buyers are familiar with open-range eggs, 18% have bought this kind of egg at least once in their life and 76% think that is fair to pay, something more if you can have a really fresh egg. Ovopel interpreted these data and the rise in sells as a sign of a growing consumers' appreciation of the "animal friendly" products:

".....Maybe it is because of the recently promoted animalist campaigns which have attacked battery farms, or maybe it is because of the rediscovery of all that is healthy and natural. What is sure is that eggs from open-range farmed hens, which can walk freely and peck soybean, corn and alfalfa in their roosts, are becoming more and more appreciated by consumers." (Ovonews n.1 Jan.1997: 8-9).

But another consumer survey in 1998, commissioned by Eurogroup for Animal Welfare, underlined some interesting data, and points to the fact that for most consumer the label "fresh", in Italian "*fresche*" is quite misleading, for 44% of the interviewed consumers do not know what it means, 24% believe that means battery eggs, and 22% believe it means "free-range" (see tab. n. 2). From the same survey it became clear that the vast majority of the consumer (64%) would like to see a label on the eggs' package telling whether the eggs come from battery farmed hens (see tab. n. 3).

In any case fresh is the most important attribute, and in the Ovopel survey emerged that, for the consumers who already knew the free-range eggs, this characteristic represented a better insurance to have really fresh eggs.

The relevance of "freshness" had already being taken in account by Ovopel that in 1994 begins to produce eggs having the "date of laying" printed on the shell with the brand name "Coccodì", which are regular battery eggs, and on the Uova della Corte. The sales of "Coccodì" as well as "Uova della Corte" eggs have constantly grown (tab.n 1), and Ovopel S.p.A., that is one of the major egg producers in Italy, has constantly enlarged its share of the market.

Tab. n. 1 Coccodì and Uova della Corte sales:

<i>year</i>	<i>Italian L.</i>
1994	25,000,000
1995	28,000,000
1996	38,000,000

- 1998, April, 18th, Verona: the organic supermarket chain NaturaSì has opened the first "only organic meat" butcher shop (CarneSì) and a new line of organically produced meat-products, 4 types of salami, 2 types of "Coppe" and Parma Ham, brand name "La PrimaVera".
- *Brief overview of organic meat production in Italy*

Organic farming is regulated by the EU Reg. n. 2092/91 but this regulation does not include specific schemes of animal farming. On this matter it refers to the IFOAM rules or the national regulations. The European Commission has been debating about a specific reg. (366/98) for a long time, without success even though after the BSE scare in 1996, there has been a growing demand for organic meat all over Europe and a growing interest in speeding up the debate around it. In Europe there are only a few countries with a national regulation for organic husbandry (Sweden, Germany, Austria, Great Britain, Denmark and France). In Italy there is not a national law on organic husbandry, but there are several regional laws on organic farming which include specific norms for animal rearing³.

Even though during the last five years there has been a remarkable increase in the number of organic farms in Italy and in organic production the presence of animals is considered very important for guaranteeing the fertility of the soil with manure, the number of farms with animals for production has been very limited, and it represents less than 10% of the total. The diffusion of organic husbandry has been very difficult in Italy for the high investments needed and the longer period of "conversion" from conventional into organic, compared with the vegetable sector.

Moreover the lack of a specific regulation (both at European level and at national level) has made more difficult the commercialisation of the meats coming from organic farms as "certified organic", and hampered the possibility to receive a premium price.

The most important experiences in this field come from the North of Italy, according to recent research⁴, carried on in 1996, there were about 90 organic cattle farms, both for milk and for meat production.

The commercialisation of the organic "animal products" is characterised by a strong uneven development: the dairy products have appeared at the beginning of the growth of the market for organically produced foods, and during the 80s' some producers have been quite

³ Tuscany was the first region in Italy that regulated such a sector: in 1994 it promulgated the Regional Law n. 31/94 that represented a model for other regions (Veneto, Emilia-Romagna, Lazio, Marche). In this law it was adopted the scheme of production approved in 1992 by AIAB (the most important certification body for organic production). In 1995 the regional government has approved a new law for organic husbandry, (L. Reg.n 54) whose goals are: safety of products, animal welfare, environmental compatibility.

⁴ See Salghetti, A. (1997) "Produzioni Biologiche e Convenzionali negli Allevamenti Bovini", Università degli Studi di Parma- Istituto di Economia Rurale e Zootecnia, pubbl. RAISA, prog. N. 3001.

successful in enlarging the size of the market and promoting the image of this type of production. One of the main example in this field is represented by “Fattoria Scaldasole”, an middle size organic dairy farm (80 cows) in Lombardy, that in the '80 started to produce organic yoghurt and distributed it at regional level, and in a few years has become an important producer of organic and non organic dairy products and juice fruits, nation wide. But in the case of meat and meat products up until the second half of the nineties there was only a very limited offer. The only stores in which one could find some meat or meat products where the organic specialised shops, the choice was confined to one or two type of meats, chicken and beef, most often only frozen. The few processed meats (cured hams, salami) very often were imported from Germany or The Netherlands and Italian products were not available. Most organic farms considered meat as a secondary products in the farm, and animals (cattle), were mainly present in the farms for producing milk and manure. Therefore it was quite difficult to develop a distribution channel for meat; most farms were selling the meat at farm level or to the local butchers without promoting the product by telling that was organically produced⁵.

Quite interesting, in this context, it is the case of the “NaturaSi” the first supermarket chain in Italy offering mostly organic foods, that in April 1998 opened in Verona the first Butcher’ shop dedicated only to organic meats and started a line of organic processed meats, “La PrimaVera”.

Interview with the marketing manager of *CarneSi*:

“...the numbers (in terms of sales) would not have suggested to move in this direction: meat and meat products represent only 0.4% of the total organic food sales. From our experience in NaturaSi, the consumers who are interested in organic products have lower consumption of meat, many of them are vegetarian or come from the world of animalism and prefer to shop in our supermarket just because of the broader offer of meat substitutes (seitan and tofu) and foods suitable for vegetarian. In our supermarkets the butcher counter has a very limited space, and we did not want to give more space to it, since it would have been a unwelcome *presence* for our most frequent consumers. Nevertheless, we had a perception that after the BSE scare in March 1996, and the long debate on animal welfare and loss of quality in industrial production, that dominated the media in the following three or four months in Italy, a growing number of consumers would have been interested in organically produced meat and traditional cured hams or salamis. Therefore we started a line of very traditional meat products, exclusively organically produced, called “la PrimaVera”, and

⁵ See Miele, M., Carotta, P., Blandini, G. (1997) “La zootecnia biologica in Toscana”, Quaderno ARSIA , Firenze.

looking at the example of The Netherlands, their specialised butcher's shops gave us the idea of moving in that directions for commercialising them. In April 1998 we opened the first butcher's shop in Verona, and in coming year we are planning to open two more shops in Milano and Padova. It is too early to say whether this is a successful choice or not, we represent the first example in Italy, but other companies are already trying to imitate us, Coop Italia and Fin Iper, which means that we are not the only one with this *vision* of the future market of meat... ”

Consumer perception of animal welfare issues on animal based foods

Public Attitudes Towards Egg Labelling

This survey was carried out on June 1998 by Mori for EAR, RSPCA (Royal Society for the Prevention of Cruelty to Animals) and Deutscher Tierschutzbund, in Great Britain, France, Germany, Italy and Spain, through interviews at home on a sample of 1000 in each country. The persons interviewed were all over 15 and the sample was representative of each country.

Italy scored the lowest levels of awareness about different egg production methods (38%), and the free range method was the most largely known.

Half of the sample answered that they didn't know from which production method the “fresh”, “extra” or “extra fresh” eggs would come. The other half sample that expressed an opinion was equally balanced between battery animals and free range production.

Confusion about eggs labelling was common to all 5 countries, and was proved by the high percentage of interviewees who either gave a wrong answer or didn't know that eggs come from battery hens.

In Italy the wrong answers to the question:

”Thinking about the different ways of producing eggs, I would like you to read this card. I am now going to read out different ways in which eggs are labelled in shops. For each of them, please tell me which one of the ways of producing eggs on this card you think is used to produce each”

were at 76% for “fresh”, at 81% for “extra fresh” and at 84% for “extra” labels.

33% of the sample declared that it is difficult to find free-range eggs. At 57% they were ready to pay more for free-range eggs and most of them quantified at 35% or more such a higher price.

Moreover, most of the interviewees in each country believe that the battery produced eggs should be labelled as such. In Italy this percentage scored 64%.

Tab. n. 2

Thinking about the different ways of producing eggs, I would like you to read this card. I am now going to read out different ways in which eggs are labelled in shops. For each of them, please tell me which one of the ways of producing eggs on this card you think is used to produce each?

Production methods ⇒	Battery or cage farming	Barn or perchery farming	Deep litter farming	Free-range farming	Don't know/ can't say
Labels ↓	(%)	(%)	(%)	(%)	(%)
Fresche	24	7	4	22	44
Extra fresche	19	5	3	24	49
Extra	16	5	4	21	54

Source: MORI

Tab. n. 3

At present in this country, there is no legal requirements for eggs produced from battery farming to be labelled as "battery" eggs. To what extent do you agree or disagree that eggs produced under battery conditions should be labelled as "battery" eggs?

	(%)
Strongly agree	47
Tend to agree	18
Neither agree nor disagree	6
Tend to disagree	3
Strongly disagree	5
Don't know/can't say	22
Agree	64
Disagree	8

Source: MORI

French and Italian Attitudes to Veal Consumption and the Treatment of the Veal Calf

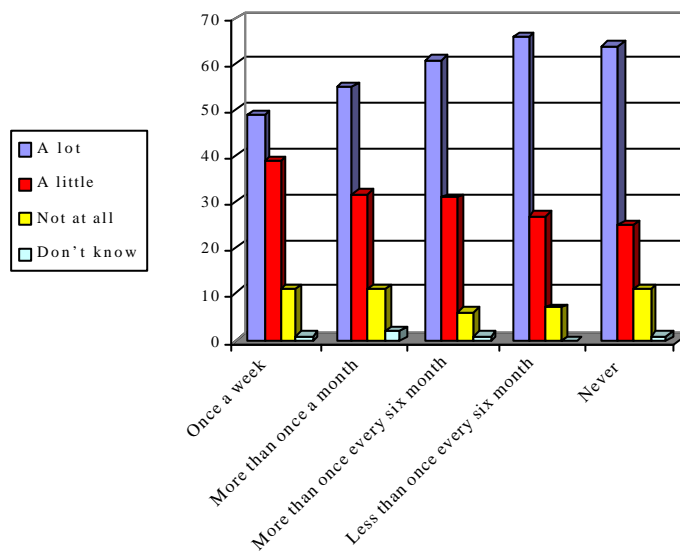
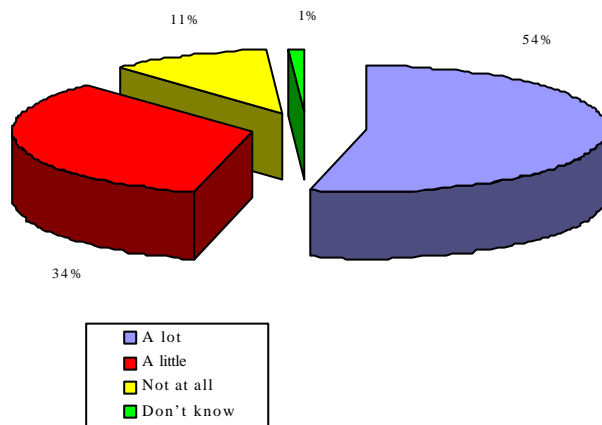
The survey was carried out by Gallup for the RSPCA on October 1995. The questionnaire consisted of 9 questions and the sample included both men and women of different ages, geographical areas and professional status.

To the question "Is animal protection something that concerns you?", the interviewees answered "yes" at 88%. Such a percentage was over 91% for the age ranging from 18 to 44 years.

Tab. n. 4
Is animal protection something that concerns you?

	Total	Sex		Age					
		Male	Female	18-24	25-34	35-44	45-54	55-64	>65
A lot	54	49	58	48	54	53	59	54	54
A little	34	37	32	44	39	38	29	30	26
Not at all	11	13	9	8	7	8	12	15	17
Don't know	1	1	2	0	0	1	1	1	3

Source: Gallup

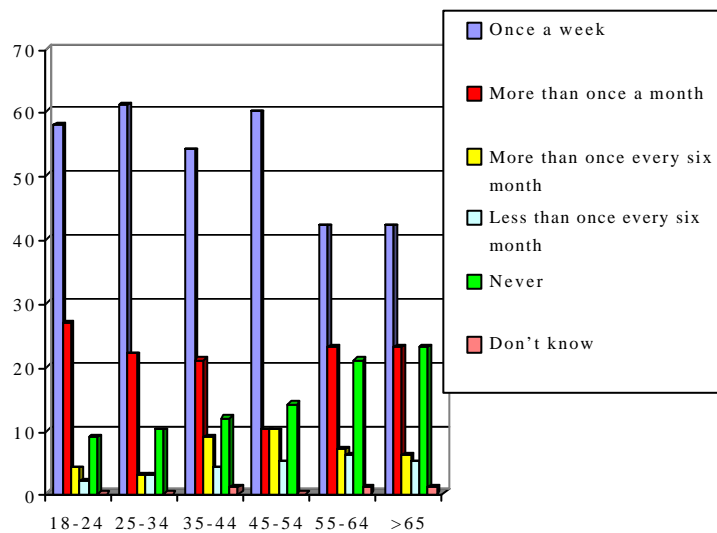
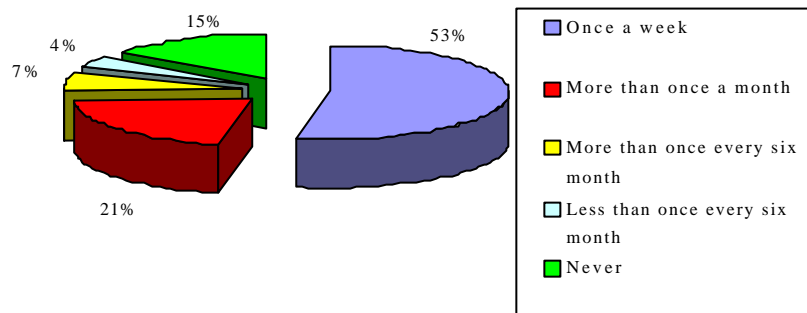


Frequency of veal consumption is high: only from 55 years and over less than half sample declared to eat it once a week. Moreover, as it was to be expected, among those who declared to be strongly concerned about animal welfare there is the higher percentage of those who never eat veal, together with the lowest frequencies of consumption.

Tab. n. 5
How often do you eat veal?

	Total	Sex		Age					
		Male	Female	18-24	25-34	35-44	45-54	55-64	>65
Once a week	53	56	50	58	61	54	60	42	42
More than once a month	21	23	19	27	22	21	10	23	23
More than once every six month	7	5	8	4	3	9	10	7	6
Less than once every six month	4	4	5	2	3	4	5	6	5
Never	15	11	18	9	10	12	14	21	23
Don't know	0	1	0	0	0	1	0	1	1
All who eat veal	852	419	433	116	186	170	132	130	117

Source: Gallup



Tab. n. 6
Why do you eat veal?

	Total	Sex		Age					
		Male	Female	18-24	25-34	35-44	45-54	55-64	>65
I like the taste	32	36	27	46	31	33	31	25	26
Versatility	7	5	8	4	6	8	7	10	4
Because it is healthy	21	20	23	25	18	15	20	25	29
I don't like red meat	0	0	1	0	1	0	1	2	0
More tender	6	4	8	1	4	6	6	6	16
Out of habit	7	8	6	3	9	11	9	3	5
For healthy reasons	2	1	3	2	3	1	2	1	4
To make a change	11	11	12	7	13	12	14	10	9
Because it is nutritious	2	2	3	1	3	3	2	5	0
because it's light/easy to digest	1	1	1	0	1	1	1	2	1
Because it's less fatty	1	0	1	0	1	0	2	1	1
Because it's quicker to cook	1	1	1	0	2	2	2	0	0
It's included in many diets	1	1	1	0	2	2	1	1	0
I find it cooked for me	3	4	3	10	3	4	2	1	2
It's easily available at the butcher	1	1	0	0	0	1	1	1	1
It's white meat	1	2	0	1	1	1	2	2	0
No special reason	0	0	0	0	0	0	0	1	0
Other	2	2	2	2	2	2	2	3	2
Don't know	8	9	7	5	9	8	7	11	7

Source: Gallup

The main reasons for consumption of this meat are the taste, the healthy reasons and “to have a change”. It is interesting to note that the youngest range is the one who particularly appreciates the taste of veal, and also scores top as to healthy motivation.

Tab. n. 7

Why don't you eat veal?

	Total	Sex		Age					
		Male	Female	18-24	25-34	35-44	45-54	55-64	>65
I don't like the taste	38	48	33	27	55	48	41	35	28
I never tried it	2	0	3	9	0	0	5	0	3
Not available	1	0	2	0	0	0	0	6	0
Cruel to animals	7	4	8	18	10	0	9	6	6
I am a vegetarian	14	14	14	55	15	22	5	6	8
Price	19	18	20	9	10	4	18	26	31
For health reason/allergy	7	8	6	0	5	4	5	6	14
Because it contains hormones	5	0	8	0	10	9	5	3	6
Because it is not sufficiently nourishing	3	0	5	0	5	4	5	6	0
I eat other type of meat	5	8	3	0	0	4	14	6	3
I eat little meat	3	6	1	0	0	4	0	0	8
Other	2	0	3	0	0	4	5	3	0
Don't know	2	0	3	0	5	0	5	3	0

Source: Gallup

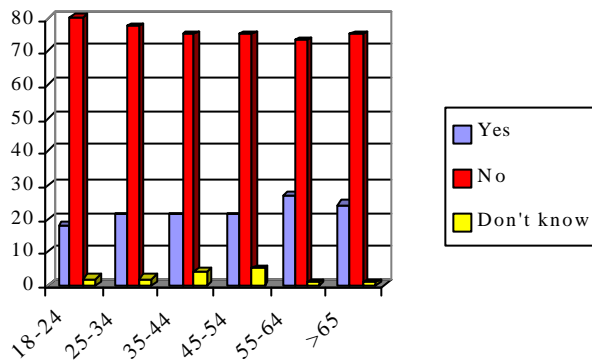
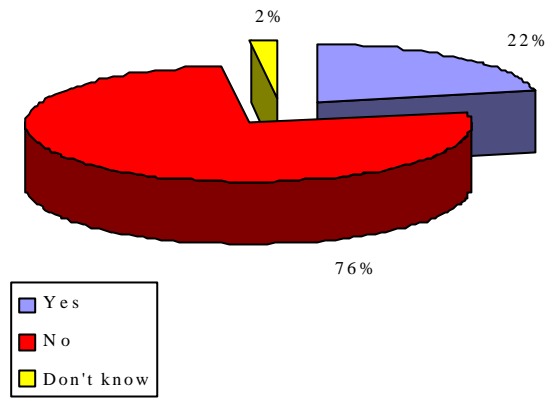
Among those who do not eat this meat, the most frequent reasons are “I don’t like the taste” (38%), “price” (19% , but much higher from 55 years on) and “I am a vegetarian” (14%). Only at 7% the answer is “it is cruel to animals”, and an equal percentage of interviewees does not eat veal for health reasons/allergy. Consistently with the previous results, among the young range 18-24 there is the lowest percentage of those who declared “I don’t like the taste” (27%); in this same range, however, we find also the highest percentage of vegetarians (55%) and of those who do not eat veal because “it is cruel to animals” (18%).

Tab. n. 8

Have you ever heard of the veal crate system?

	Total	Sex		Age					
		Male	Female	18-24	25-34	35-44	45-54	55-64	>65
Yes	22	24	20	18	21	21	21	27	24
No	76	73	78	80	77	75	75	73	75
Don't know	2	2	2	2	2	4	5	1	1

Source: Gallup



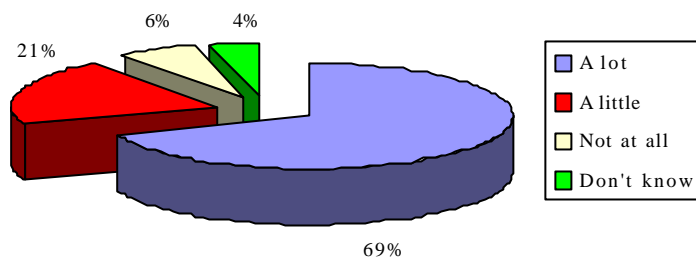
The most interesting result of the questionnaire is that at 76% the sample had never heard of the veal crate system before, and at 90% was concerned after having known about it. In addition, 50% of the sample think it is possible to produce veal more humanely.

Tab. n. 9

...do you personally feel very concerned, slightly concerned or not at all concerned by the keeping of calves in veal crates?

	Total	Sex		Age					
		Male	Female	18-24	25-34	35-44	45-54	55-64	>65
A lot	69	61	77	70	71	64	73	72	67
A little	21	27	15	24	21	26	17	17	18
Not at all	6	8	4	4	4	7	8	5	9
Don't know	4	3	4	2	3	3	3	6	6

Source: Gallup



Tab. n. 10
It is possible to produce veal more humanely

	Total	Sex		Age					
		Male	Female	18-24	25-34	35-44	45-54	55-64	>65
Yes, definitely	50	55	46	50	54	50	55	50	41
yes, perhaps	26	26	25	32	28	24	25	24	21
No, probably not	8	8	8	8	6	9	6	7	12
No, definitely not	11	9	14	8	7	13	10	13	18
Don't know	5	3	7	2	5	4	3	6	8

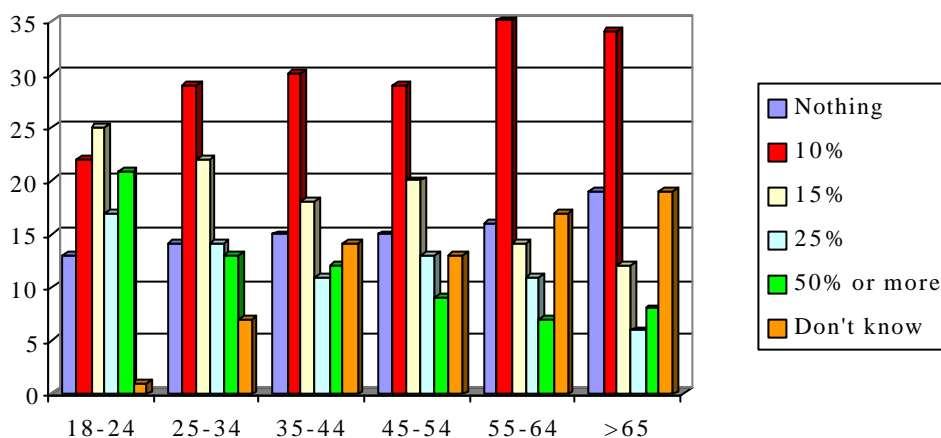
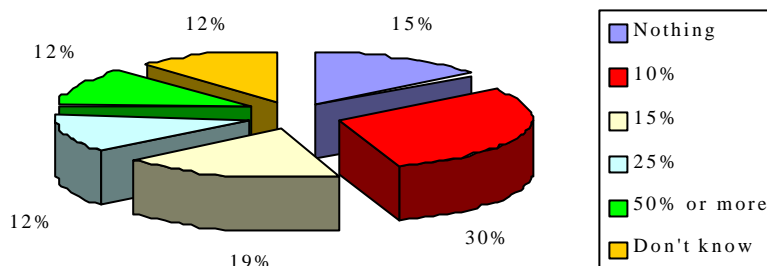
Source: Gallup

To the question “how much more would you be prepared to pay?”, at 30% interviewees fall in the category of 10%, and the youngest people are those more ready to pay higher different prices.

Tab. n. 11
How much more would you be prepared to pay...?

	Total	Sex		Age					
		Male	Female	18-24	25-34	35-44	45-54	55-64	>65
Nothing	15	15	16	13	14	15	15	16	19
10%	30	29	31	22	29	30	29	35	34
15%	19	21	17	25	22	18	20	14	12
25%	12	13	11	17	14	11	13	11	6
50% or more	12	11	13	21	13	12	9	7	8
Don't know	12	11	13	1	7	14	13	17	19

Source: Gallup



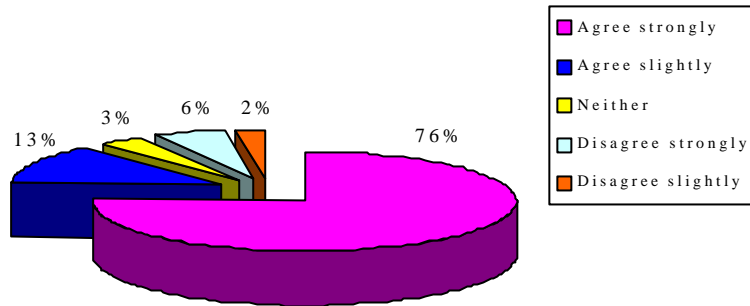
Quality policy and consumer behaviour (EU DGXII-Fair project 95- 0046)

In order to analyse consumers behaviour and preferences towards beef, pork and chicken, the six countries taking part to the project devised a common questionnaire to be submitted to a sample of 500 consumers in each country.

The interviews, lasting about 25 minutes, were carried out by telephone over the whole Italian territory to those who usually decide the family purchase of food.

The questionnaire included the two following statements, on which the general agreement was almost unanimous:

	Agree strongly	Agree slightly	Neither	Disagree strongly	Disagree slightly
I prefer to buy meat from animals which I know have been treated well	76.1	12.9	3.1	5.7	2.2



	Agree strongly	Agree slightly	Neither	Disagree strongly	Disagree slightly
We should have more respects for animals	89.0	8.5	0.8	0.6	1.0



Moreover, in a focus group to the question “Animal welfare is or could be included among the standards of your choice?” answers were as follows:

- I never buy rabbit because I know it’s a very delicate animal, it can easily fall ill. I’m afraid of this and I don’t buy it.
- Yes, I never bought veal very willingly. I’ve read, even before the mad cow events, how they are bred and it is terrible.
- I don’t want to sound evil, yet I have no scruples about eating meat.
- I would enjoy it best if I knew animals are properly bred.
- Yes, me too. But they have to be eaten all the same.
- I would feel reassured, if an animal had been treated well.

- I feel sorry when eating meat. To know that animals had lived well, would make me more satisfied.
- When I think about how animals are bred and killed, I won't eat meat anymore.
- Even turkeys. I've been told that if you see how they are bred you won't eat turkey any more.

As to the question "Does anybody think of some aspects concerning the animal?", there are two interesting answers (note that the focus groups were held just after the mad cow scandal):

- No, it's only that I think that life must go on and since from the very beginning man has always eaten meat. These last events made me think over the whole matter, and I've been scared from the ethical problems.
- Many years ago I went to see a famous company which produces sausages and cheese. I was literally shocked at seeing all those pigs inside those enormous room. I stopped eating meat for a while, then I started again. And I'm also touched if I see some TV program on kids at Easter, for example. Then, when you're sitting at table, you overcome your shock and eat them all the same, but only if you don't think about it.

Eggs and large distribution in Lombardia – A DOXA survey on consumers: purchase attitudes and behaviour.

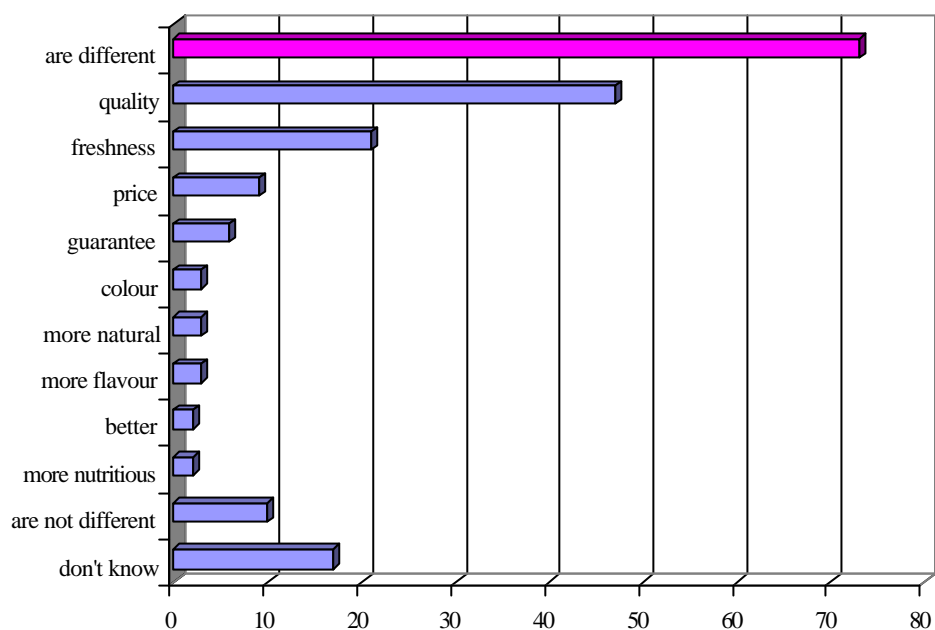
This survey was carried out by DOXA for the Ovopel, the first company in Italy which in 1991 began to market free-range eggs (Uova della Corte, "Eggs from the farm yard").

The interviews were carried out between 13th December 1994 and 24th January 1995 on a sample of 691 customers, randomly selected at the exits of 44 sales points of large distribution in Lombardia.

As far as animal welfare is concerned, remarkable results are the following:

- approximately at 50% interviewees knew about free range farmed hens.
- at 18% they had bought them at least one time.
- at 73% they think that eggs from free range hens are different from the others. In particular, at 47% they consider them different as to quality, at 21% as to freshness, at 6% as to offered guarantees, at 9% as to price.
- at 67% consumers think that "it is fair to pay a little more" in order to have eggs from free range farmed hens.

Eggs from open-range farmed hens...



Survey on the foie gras

The survey was carried out after the launch of the Italian campaign against the production of foie gras. The campaign began on June 1997 and was promoted by the LAV.

The survey aimed at identifying the awareness among Italian people about rearing methods of geese and ducks for the production of foie gras. Between the end of 1997 and the beginning of 1998, a questionnaire was distributed through different channels, i.e. the LAV magazine “Impronte”, Internet web and various associations or groups. The returned copies of the questionnaire were 1,888.

In the South the response to the initiative was stronger: 95.6% instead of 26.1% in the North, 24.5% in the Centre and 9.0% in the islands (4.4% brought no geographical indications). Generally, few questionnaires came back from the large cities. Prevalent age was included between 14 and 30 years (55.6%), and the educational level was medium-high (57.2% secondary high school and 13.45% university degrees).

Although the percentage of animalists is high and results are not representative of the whole Italian situation, a few interesting data are evident: 60.2% answered yes to the question “Do you know what foie gras is?”, yet to the questions “Do you know what hepatic steatosis is?” and “Do you know what gavage is?” the percentages of “no” range from 65% to 85%; they also vary from 73% to 76% with the more specific questions about rearing and production methods for the foie gras. Therefore, it becomes clear that even those who answered “yes” to the question “Do you know what foie gras is?” have only a hazy knowledge of the production methods.

To the question “Would you eat it?”, the sample answered “no” at 81%. Out of this percentage, 20% put forward the rejection of cruelty, abuse and violence on animals; 6% gave the respect for animal rights and love for animals as first motivation; and more than 17% declared to be vegetarian (this data is strongly affected by the large participation of animalists).

The LAV, together with the EAR, programmed a series of initiatives, such as peaceful demonstrations in front of the facilities for the rearing of geese and the production of foie gras; the next event is planned to take place on November, i.e. the period of the year in which consumption of foie gras remarkably grows.

Methods of productions with the highest content of animal welfare: private initiatives

Legislation

The following EU directives (see tab. n. 12), as well as the related Italian laws of acknowledgement, concern animal welfare of transportation, breeding and slaughtering stages. It can be noted that not all the EU directives have been acknowledged and that usually times of enforcement are rather long.

Finally, we mention the laws concerning organic zootechnics, which in Italy meets the requirements of animal welfare at best.

The EU regulation nr. 2091/91 does not provide specific set of rules for organic zootechnics, but it refers back to international laws (IFOAM) or, whether existing, to the national regulations for the certification of biologic production.

At present in the European Union only a few countries (Sweden, Germany, Austria, United Kingdom, Denmark and France) provide specific rules for organic breeding, which however are largely different.

In Italy there are no national laws, but only regional laws on organic farm which also provide set of rules on zootechnics.

The Toscana region was the first to regulate this sector through the Regional Law nr. 31/94, which has served as reference also to other regions (Lazio, Marche). Toscana adopted the AIAB regulations, in force since January 1992.

In those regions where regional regulations are lacking, the single control agency operates by following internal rules which are conform with international laws (IFOAM).

AIAB- scheme of production, 1992; Regulations / Regional Law nr. 31/94 and 54/95:

Rules have been set up on the ground of the following criteria: product health, respect of ecological requirements of the animal and safety of environment.

Provisions concern as follows:

- *Intensiveness of breeding*: Number of head must be proportional to grazing surfaces, with a maximum of 3 UBA per ha.
- *Races*: Preferably local races, with strong environmental adaptability.
- *Housing*: Permanent housing is forbidden; minimum practicable surfaces are set up according to the species, along with technical standards for the housing premises.
- *Interventions on anatomy and physiology of the animal*: Castration and mutilations are prohibited, with a few specific exceptions. Fertilisation must be natural and insemination is allowed only in specific cases. Embryo transfer are forbidden, as well as embryo and cell manipulation.
- *Feeding*: Forced feeding is prohibited.
- *Origin*: feed must be from organic farms, with the sole exception of integration through non organic feed up to a maximum 20% dry matter in daily ration. Drugs and feed enriched by pharmaceutical products are anyway forbidden. The regulations concern also: the *typologies* of fodder and complementary products; the *use* of concentrated additives and by-products; *suckling and weaning*.
- *Veterinary Activities*: Phytotherapy, homeopathy, isopathy and natural medicine are allowed. Only two allopathic medicine treatments are allowed over the whole animal life.
- *Hygiene of premises*: The regulations specify the allowed products.
- *Conversion to organic zootechnical production*: The regulations set up different times for every single species.

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