



Report of the Third & Final Stakeholder Meeting: Higher Duck Welfare Programme

Held on 5th October 2011
Royal College of Physicians, London



People in Attendance

Present

- **Don Broom**
Cambridge University
- **Guionar Liste**
Cambridge University
- **Philip Jones**
Reading University
- **Charles Bourns**
NFU Poultry Board
- **Kelly Watson**
NFU Poultry Board
- **Sophia Hepple**
DEFRA
- **René Olivieri**
The Tubney Charitable Trust
- **Sarah Ridley**
The Tubney Charitable Trust
- **Peter Bradnock**
British Poultry Council
- **Maire Burnett**
British Poultry Council
- **Keith Gooderham**
British Veterinary Poultry Assoc
- **Geoffrey Buchanan**
Green Label Foods
- **Brian Kenyon**
Cherry Valley Farms
- **Pearce Hughes**
ASDA
- **Mia Fernyhough**
CIWF
- **Ella Sunyer**
Forster Agency
- **Pippa Rendel**
Forster Agency
- **Chiara Caiati**
Euromonitor International
- **Hannah Temple**
Euromonitor International
- **Craig Elwin**
Euromonitor International
- **Matthew Cull**
Major Donor & Trust Manager
- **Leigh Grant**
Chief Executive Freedom Food
- **Isabel Glenister**
Project Co-ordinator
- **Eloise Shavelar**
Campaign Manager
- **Sarah Winder**
Campaign Manager (Higher welfare food & farming)
- **Catherine Peerless**
Press Officer

RSPCA Team

- **John Rolls**
Director of Policy
- **David Thomas**
Project Consultant
- **Mark Smith**
Major Donor & Trust Account Manager
- **Alastair MacMillan**
Chief Veterinary Officer
- **Marc Cooper**
Senior Scientific Manager



Agenda

Morning Session

- **Welcome & introductions**
Mr John Rolls
Director of Policy, RSPCA
- **Overview of background to the funding of project**
Mr René Olivieri
Chair of the Trustees
The Tubney Charitable Trust
- **Final Report**
 - **Development of a commercially viable, open water facility to allow the expression of key, natural, water-related behaviours in farmed ducks**
Dr Guiomar Liste
Researcher
Cambridge University
 - **Investigation of the financial effects of providing an open water source for farmed ducks in the UK**
Dr Philip Jones
Senior Research Fellow
Centre for Agricultural Strategy
University of Reading

Afternoon Session

- **Market Research**
 - **Consumer attitudes and behaviour in food purchasing**
 - **Opportunities, barriers & trends within the food service sector**
Ms Eloise Shavela
External Affairs, RSPCA
 - **And presentations by**
Chiara Caiati,
Hannah Temple,
Euromonitor International
Pippa Rendel
Ella Sunyer
Forster Agency
- **Communications Plan**
 - **RSPCA farm animal welfare campaign**
 - **Freedom Food Marketing**
Ms Eloise Shavelar

Mr Leigh Grant
Chief Executive
Freedom Food Ltd

Conclusions

Summing Up

Mr René Olivieri

Closing comments

Mr John Rolls



Welcome & Introduction

Overview of background to the funding of project

John Rolls gave the welcome and introduced Rene Olivieri, stakeholders, and industry representatives.

René Olivieri gave an update on the life of the Tubney Charitable Trust, (soon to be at an end March 2012), their activities, and their affiliates, one being the RSPCA, who received funding to undertake this project. He continued with an overview of the project and its expectations

Overview of the project

- Having outlined the goal of the project to be the **improvement of duck welfare in a commercial setting**, he went on to express gratitude for the work done so far by various researchers, and explained how this has been instrumental in developing a long term, and financially sound plan of action.
- This led into an assessment of how this plan could be related to the major users of duck meat, (briefly identified as restaurants and supermarket chains), and particularly how the findings of the research could be used to influence them, in order to **develop an expectation of higher welfare duck meat**.
- He highlighted the need for collaboration in order to avoid implementation of any imposed ruling based upon circumstantial, and untested scientific data. To this end, he requested that the research provided, should be treated and used as a base on which to **build and test a commercially viable, and appropriate system**, which would be agreeable to the entire group.
- In order to facilitate this collaboration, he reiterated the goals of the project, and stated that the focus of the days meeting would be to address these goals, **identify any obstacles that may be encountered**, and gain agreement on how to overcome these.
- He concluded by saying that the inevitable goal of this discussion and agreement would then allow for a **unanimously approved system to change the production and consumption practices that currently support the industry**.



Final Report:

Development of a commercially viable, open water facility to allow the expression of key, natural, water-related behaviours in farmed ducks

Having introduced herself, Guiomar Liste presented the findings of Cambridge University. She began with an overview of the research programme, explaining the 3 stages of investigation, their aims, and who was involved.

Dividing the 3 stages into their respective sections, she offered an explanation of the methodology behind each phase, the environments and controls, measurements taken and the conclusions which were drawn at the end of each stage. These conclusions were broken down into effects on health, effects on behaviour including water depth preference, and a practical test at commercial level.

Within this third and final commercial test stage, assessments were made on health and production. From here she concentrated on the overall conclusions of the research which showed:

- Open water improves duck welfare
- Ducks prefer water where they can stand, over deep-swimming water that does not allow standing
- Age does not have a great impact on bathing behaviour
- Water depth, water temperature and water cleanliness do affect bathing behaviour
- Open water systems involve a *higher water usage* (e.g. 1.5l / duck / day)
- *Acceptable water quality* is difficult to maintain in open water systems



Final Report:

Development of a commercially viable, open water facility to allow the expression of key, natural, water-related behaviours in farmed ducks (contd)

Based upon these conclusions the following recommendations were made:

- Open water resources should always be placed over a properly constructed drainage area.
 - Depth of water should be between 10 and 20 cm.
 - Drinkers should always be available, in conjunction with open water, to provide clean drinking water.
 - Open water resources should be cleaned and refilled at least twice a day.
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The following papers were cited as sources:

- O'Driscoll, K. K. M., Broom, D. M. 2011. *Does access to open water affect the health of Pekin ducks (Anas platyrhynchos)?* Poultry Science 90, 299-307.
- O'Driscoll, K. K. M., Broom, D. M. *Does access to open water affect the behaviour of Pekin ducks (Anas platyrhynchos)?* Under review, Applied Animal Behaviour Science.
- Liste, G., Kirkden, R. D., Broom, D. M. *Effect of water depth on the preference and bathing behaviour of commercial Pekin ducks.* Submitted, Applied Animal Behaviour Science.
- Liste, G., Kirkden, R. D., Broom, D. M. *A commercial trial evaluating three open water sources for farmed ducks: effects on health and production.* In preparation.
- Liste, G., Kirkden, R. D., Broom, D. M. *A commercial trial evaluating three open water sources for farmed ducks: effects on water usage and water quality.* In preparation.



Final Report

Investigation of the financial effects of providing an open water source for farmed ducks in the UK.

Philip Jones introduced the Centre for Agricultural Study at reading University, and explained what they do, as well as their aims regarding this project which were to:

Compare the financial impacts of providing open water to ducks under different arrangements:

These arrangements were:

- RSPCA Welfare Standards compliant system (current)
- a new 'preferred' system, identified as prospective for welfare (informed by Cambridge trials)

Leading on from here, he explained the methodology behind their study, divided into two phases, the first of which involved:

- Development of approach(es) (Scoping study)
- Scope out availability of data to carry out economic evaluation
- Propose a methodology for the full evaluation

4 approaches were suggested, and evaluated against the availability of data, and the cost and revenue implications of each approach. From this, it was decided that either Plan C or Plan D would be the most appropriate options.



Final Report

Investigation of the financial effects of providing an open water source for farmed ducks in the UK. (contd)

Plan C

- Spreadsheet-based cost calculator
- Net Margin calculations for multiple production systems (i.e. experimental & control)
- Calculations done in-house by producers
- Impacts of changes (in per cent change terms) passed back to Reading
- Both parties to discuss proposal with their respective boards
- Some limitations to this approach

Plan D

- A new trial designed specifically to collect data for the economic evaluation
- All data generated in identical conditions (excepting nature of open water provision)
- Trial hosted in a fully commercial environment
- RSPCA approved a proposal to producers
 - Trial design jointly by all parties (informed by latest Cambridge findings)
- Green Label farms expressed some interest in hosting the trial (subject to board approval)

Having defined both these options, the current situation as regards the scoping report was shown to be as follows:

- Cambridge have delivered their findings/recommendations to RSPCA
- Reading await sight of RSPCA proposals for changes to welfare standards (to begin trial design process)
- Green Label Farms still considering the request to participate in Plan D.

Next steps

Firm up the details of the proposed trial in Plan D and submit to Green Label Farms **or**
Possibly return to Plan C as an alternative option



Market Research

Consumer attitudes and behaviour in food purchasing within the food service sector

- The Forster Agency opened by presenting the aims and the rationale behind their research, stating the welfare of farmed ducks was of paramount importance.
- Figures from a 2009 IGD study showed the percentage of consumer awareness as regards Duck welfare, and also consumption habits (many consumers only eat duck 1-3 times per year).
- Dividing the market into retail and food service showed how welfare concerns are currently viewed and dealt with.
- In a food service setting, i.e. restaurants and takeaways, the demand for higher welfare meat is lower than that in a retail setting. This is due to the sense of quality associated with the restaurant dining experience, which promotes an assumption of quality and is not conducive to asking welfare related questions.
- From this, a number of recommendations were drawn up as regards the retail and food service sectors. These were as follows:

Duck Campaign

- There is a need to persuade people that it's important for them to be concerned
- Particular approaches to proposition development
 - Emphasising the number of ducks farmed for meat
 - Raising awareness of the fact that many people eat duck irregularly
 - Highlighting that only Freedom Food duck meat is provided an adequate open water source
 - Communicating a clear call to action

Food Service Sector

- Consumer facing activity to focus on changing behaviour in relation to choosing a restaurant /takeaway that serves higher welfare meat
- Target the food service industry – prioritise influencing meat sourcing (including duck)
- Encourage consumers to check menus for an RSPCA certification mark



Market Research (Contd)

Opportunities, barriers & trends within the food service sector

- The Euromonitor Agency presented an overview of the key trends in duck production which showed that awareness amongst companies of higher quality duck meat is on the increase in the UK.
- However these trends were contrasted to the barriers of cost, lack of both consumer demand and confidence in welfare standards, as well as the small number of higher welfare duck meat suppliers.
- A series of flowcharts depicted the route to market for food service outlets and this demonstrated the complexity of duck meat sourcing compared with the retail industry.
- The attitudes and behaviour of the supply chain were studied and showed that the constraints of price, and the limited range of high welfare suppliers, restricted any significant move toward ethical sourcing/purchasing.
- However, assumptions of higher welfare duck meat did show an awareness of the difference in taste and quality, despite the fact that few customers ask questions regarding welfare.
- Wholesalers also reported little interest from their clients regarding duck welfare.
- This information was then used to create a list of recommended actions which featured:

HIGH COSTS

- Increase demand in order to reach economies of scale, enabling farmers to lower prices.
- Demonstrate the true cost of food and encourage consumers to pay this true cost.

LOW AWARENESS

- Media campaigns.
- Education/promotion in popular media outlets, trade press and events.

LOW DEMAND

- Connections between higher welfare and meat quality.
- Consumer education.
- Engagement with a broader range of suppliers.

LOW CONFIDENCE

- Engage in a broad conversation with stakeholders.
- Communicate the benefits of certification.



Market Research (Contd)

Actionable Insights

Consumers	Food service industry
Low awareness of duck welfare issues	Low awareness of duck welfare issues
Reluctance to ask about the provenance of meat (embarrassment & low awareness)	Think that consumers are uninterested in duck welfare
Need clear guidance on what they should be doing when eating out/ordering in	Require more support to source suitable 'ethical' suppliers
Think the onus should be on restaurants to provide information	Want to see evidence of consumer interest in higher welfare
Favour restaurants that serve higher welfare when given a choice	Showing growing interest in higher welfare meat provision
Believe restaurants are responsible for sourcing ethically	Believe that there is currently no market for higher welfare duck



Market Research (Contd)

Actionable Insights

From the previously presented table, the following points of action were drawn up.

- Increase consumer awareness and choice.
- Champion positive behaviour in food service industry.
- Build the business case for higher welfare among food service industry.

However, these actions face challenges from the following elements:

- Low awareness.
- Labelling confusion.
- Reserved consumer behaviour when eating out.
- Food service sector is fragmented.
- Awareness of ethical purchasing is low among Chinese cuisine sector.

By contrast, opportunities for the campaign include:

Clear message regarding the welfare of farmed

ducks:

- Ducks need adequate open water.
- Choose *Freedom Food* labelled duck.

Receptive consumers

- Some people already thinking about higher welfare in a supermarket setting.
- People like ducks and relate to ducks.
- Increased awareness could influence behaviour.
- Eating out is a treat and people prepared to pay a little bit more.
- Leverage appetite to buy British.

Ethically conscious businesses

- Build on positive examples.
- Good Business Awards.



Market Research (Contd)

Campaign Elements

As regards a duck specific campaign, possible elements include:

Empowering consumers

- Raise awareness of welfare of ducks reared for meat.
- Simple message = *ducks need water*.
- Provide solutions on consumer choice.

Influence food service sector policies

- Highlight positive behaviour in higher welfare duck purchasing.
- Work with a small number of Chinese restaurants already sourcing to high standard.
- Identify those with some propensity to improve standards.
- Provide information on higher welfare duck suppliers.

From a broader angle, encompassing general food purchasing and consumption:

Empowering consumers

- Provide information across frequently eaten species.
- Build on success of Freedom Food *Simply Ask* campaign.
- Consider a new category for Good Business Awards peoples choice.

Food service industry

- Focus on all animal welfare policies.
- Lobby and support across all meats.
- Showcase good practice.
- Take solutions to events, key media, Good Business Awards.

Next Steps: Currently finalising campaign plan and activity for 2012. It is understood that RSPCA standards are the solution to implementing higher duck welfare standards and the Freedom Food assurance scheme is an appropriate mode of communication with consumers.



Communications Plan

Freedom Food Marketing & Improving the welfare of ducks farmed for meat

- Leigh Grant reflected on why the project was conceived, and the importance of taking the welfare of ducks forward. Key drivers included:
 - Viva web based campaign against farmed ducks.
 - Poor consumer understanding of farming.
 - Consumer perception linked to ducks on village pond.
 - Ducks represent the second largest species farmed in the UK.
 - Relatively low sales volumes in retailers.
 - Lack of focussed practical research.
- Approaching these issues pragmatically:
 - Focussed research to better understand behaviour.
 - Trials to achieve best solution for ducks.
 - Research to properly evaluate cost of implementation.
 - Consumer research to inform campaign activity.
 - A programme of activity to increase awareness of issues and provide a solution.
 - An opportunity to support producers enabling higher welfare production standards.
 - A better life for ducks.



Communications Plan

Freedom Food Marketing & Improving the welfare of ducks farmed for meat (contd)

Despite the current economic downturn consumers continue to buy higher welfare food.

- FF labelled pork rose by 62% 2010 vs 2009.
Year on year 1st quarter up 116%.
- 48% of shoppers say that Animal Welfare is very important.
- 31% thought that they would buy more by 2012.
- Twice as many shoppers claim to have purchased a Higher Welfare product over the past four years.

Price sensitivity

- Impact of increased production costs are negligible.
- Whole ducks and primal cuts – Low sales volume.
- Duck is a premium / indulgent purchase.
- Less price sensitive than other protein.
- Campaigning activity will increase consumer awareness.
- Opportunity to enhance CSR & Brand credentials.



Conclusions

Summing Up

- René Olivieri opened this session by inviting the floor to raise any issues, which would then be addressed in order to provide clarification on the key points which would take the project forward.
- He stressed the need for collaboration, consultation and communication between the producers and the RSPCA.
- This led on to a series of discussions on topics including:
 - Quality of water.
 - The relationship between open water, and poor health/injuries.
 - Publication of research papers.
 - The availability and collection of research from other sources (including Oxford, Germany, and Holland) for the benefit of the industry.
 - Financial concerns and how to take the economic study forward.
 - Clarification on and future decisions regarding which standard to use as a measure for duck welfare.
 - Other options for the provision of water.
 - Consumer attitudes and presenting positive messages.

John Rolls and René Olivieri closed the meeting and thanked everyone for attending.