

A woman with blonde hair, wearing green overalls, is smiling and holding a small pink piglet in her arms. She is sitting in a farm setting with a brick wall and some equipment visible in the background. In the lower-left corner, there is a decorative graphic of a pig's head in profile, rendered in a light orange color.

# Technical Strategy for the Future of European Pigmear Sector

Copa and Cogeca Working  
Party on Pigmear

Brussels, 22 september 2022

# Introduction

The European pig sector has gone through several crisis periods in the last decades which have substantially impacted the production and development of the sector. These issues have increased over time and most often farmers and cooperatives have been unable to influence or control the developments. On behalf of Copa and Cogeca as well as the European pig producers that we represent, we would like to thank the Commissioner for setting up the European Pigmear Reflection Group and for the willingness to find solutions for the European pig production for the long term. Copa and Cogeca therefore propose an action plan to prepare the sector for the challenges of the future and contribute to the work of the Commission. This plan aims to help farmers achieve the robustness and resilience needed to deal with new realities and adapt to the needs of consumers and citizens in the 21st century.


The EU plays a central role in supplying high-quality meat proteins for a high number of consumers and contributes to EU food security and sovereignty. The importance of affordable food is illustrated by the 33 million EU-citizens<sup>1</sup> who cannot afford a meal of decent quality including meat and fish or their nutritional equivalent every second day. Facing food insecurity and affordability risks becomes even more challenging during disruptive events such as ASF, the COVID-19 pandemic and the ongoing war in Ukraine. Furthermore, there is a growing demand for animal proteins on the world market and the EU has the knowledge, infrastructure, and capacity to fight against world hunger in an honest and sustainable way with the highest standards in the world. It is important to consider both internal relations within the EU and globalisation and find a balanced approach. The single market is one of the greatest achievements of the Union, and it is based on the principles of free trade and a level playing field, which are also the driving forces behind the successful development of the European pig meat sector.

European pig farmers are among the world leaders in supplying affordable and sustainable food, thereby contributing to economic growth, and creating jobs for millions of Europeans. This is especially the case in rural areas of European member states, where agricultural production contributes to regional economies and thereby fosters regional stability.

To ensure the survival of the EU pig meat sector, all three pillars of sustainable agriculture must be taken into consideration – environmental, social and economic – to prevent production from being transferred to third countries with lower standards. High standards in food quality and food safety contribute to the EU's excellent reputation on the world market. Today, the sector already contributes to sustainability and the circular economy. To state just one example, more than 185 products have been developed which make use of the pig carcass including, among other things, blood used by the pharmaceutical industry to produce the life-saving product Heparin, leather for leather products, residue materials for brushes, isolation material, fertilisers etc.

The pig industry has achieved a high level of utilisation for the pig carcass and has reduced food waste to a minimum though a variety of product developments throughout the years. For the future of European pig production, it will be crucial to support young farmers and enable them to lead their farms in a profitable way, with the reputation the sector and the farming profession deserve, and to ensure the longevity of the EU's food-producing communities. In the last years, EU pig producers have gone through many periods of extremely low prices below production costs which have prevented young farmers from starting or continuing their work in the sector. To preserve a strong and resilient sector for future generations, the profitability of the sector is key and must be improved, especially when it comes to the relationships within the value chain and the position of farmers within it.

1. Eurostat (2018) : Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day.



The European Commission has integrated the Farm to Fork Strategy into its Green Deal which aims to achieve improvements in various fields such as animal health and welfare, biodiversity, and environmental protection. This is a challenge for farmers in multiple ways and requires the cooperation of all actors involved in the food system. With the Farm to Fork Strategy as it has been proposed, pig production in the EU is expected to decrease between 6.7% and 18% and the market price to increase of between 9.5% and 48%<sup>2</sup>. This price increase would also have an impact on the prices on the world market and therefore also on food security both within and outside the EU. The adoption of the Farm to Fork Strategy by the EU risks increasing the number of people facing food insecurity worldwide by 22 million, and part of this would be due to impacts on the pig sector<sup>3</sup>. The decreased production in the EU would also lead to changes to the EU's position as a net exporter. In short, the EU export volume is expected to decrease by up to one-fourth of today's exports<sup>4</sup>. While emissions in EU pork production would be reduced by 7 Mio. t CO<sub>2</sub>eq., 6 Mio. t of these emissions would leak to non-EU countries<sup>5</sup>.

In addition, the progress made in the EU pig sector must be acknowledged and there needs to be a clear sign communicating that there is a future for EU livestock and pig production. The European pigmeat sector call on the European Commission and the European Parliament, to commit to this vision and provide a roadmap for the development of a sustainable and resilient European pigmeat sector.

2. USDA (2020): Economic and Food Security Impacts of the EU Farm to Fork Strategy

JRC (2021): Modelling environmental and climate ambition in the agricultural sector with the CAPRI model

Grain Club (2021): Economic and Environmental Impacts of the Green Deal on the Agricultural Economy (Kiel University)

3. USDA (2020): Economic and Food Security Impacts of the EU Farm to Fork Strategy

4. Grain Club (2021): Economic and Environmental Impacts of the Green Deal on the Agricultural Economy (Kiel University)

5. Grain Club (2021): Economic and Environmental Impacts of the Green Deal on the Agricultural Economy (Kiel University)



# Contents

Introduction .....	1
European pigmeat sector fit for 2050 .....	4
Our mission	
Our vision	
Areas for action	
Position of farmers in the value chain .....	5
Fair income to farmers .....	6
Trade and market access .....	7
Feed .....	8
Social aspects .....	9
Climate and environment .....	12
Animal welfare .....	14
Animal health .....	19
Antimicrobial resistance .....	21
Research and development .....	23
Relationship to consumers .....	24

# European pigmeat sector fit for 2050

## Our mission

We contribute to economic growth; we secure and revitalise rural regions and create jobs for millions of people in Europe through a sustainable and resilient European pigmeat sector. We supply sustainable, safe, nutritious, and high-quality meat protein at affordable prices to a global population, thus contributing to food and nutrition security.

## Our vision

In 2050, the European pigmeat sector has become the global standard for producing sustainable, safe, nutritious, and high-quality meat proteins at affordable prices to a global population. We have reached this position by being at the forefront of applied research and innovation creating solutions for food safety, the environment, climate, animal health and animal welfare which go hand in hand with the UN sustainability goals, while at the same time ensuring a fair income for farmers. We have developed a harmonised internal EU-market, where both short and long supply chain structures form the basis for a diverse and consumer-driven market.

Our global standard has become the cornerstone of our export of knowledge, solutions, technology and food safety standards to facilitate and help countries outside of Europe to become self-sufficient in a sustainable and resource-efficient way. We play an important role in helping to stabilise countries and regions which today are subject to risk of migration due to lack of food and nutrition security.

## Areas for action

To succeed and reach above goals the strategy will address the following areas for actions towards the goal for 2050.



## Position of farmers in the value chain

In order to deliver on the strategy objectives, the responsibilities and costs need to be shared among all actors in the food chain. Additionally, achieving ambitious goals requires synergies between sectors and players in the value chains. In this context, cooperation among farmers is critical for accomplishing economic, environmental and social goals.

As farmer-owned enterprises, agri-cooperatives create economies of scale in the market by concentrating food supply and strengthening the bargaining power of farmers. This allows the implementation of innovative and sustainable actions that create employment in depopulated rural areas, and benefit farmers, consumers and the overall functioning of the value chain. Agri-cooperatives require a supportive legislative environment to further develop innovative business models that can deliver on the objectives of the Farm to Fork Strategy and contribute to the achievement of the UN Sustainable Development Goals. In this respect, both cooperation among farmers engaged in promoting sustainability and ways to fairly share the added value created by sustainable products and actions with producers need to be supported. The EU farming model is based on family-run entities. Through the cooperatives model of enterprise, farmers can combine their efforts and coordinate their production. Still, despite horizontal cooperation, the EU farming sector faces increased market power and strong concentration on the other side of the value chain, especially when it comes to the retail sector.

The difference in negotiating power enables the retail sector to have full control over pricing and placing of products. While farmers struggle to cover their production costs, consumers are attracted with low price campaigns. Various cuts are sold under production costs and meat is often used as a product to attract consumers to the supermarket. Consumers have lost the overview and perception of how much meat costs and are on a constant lookout for cheaper offers. There is a clear lack of transparency when it comes to production costs. Furthermore, low prices are often perceived to signify low quality which harms the image of the pig meat sector. Prices for pigmeat are generally below the prices for other kinds of meat, which can additionally affect the view on the sector. Additional price reductions are achieved using retailer's own brands, which blur the exact origin of the product and enable the retail sector to switch producers if their requirements are not adhered to. It further strengthens the oligopoly position the retail sector already has. This must be subject to tighter controls and regulation.

At the same time, EU policy agendas and some consumer groups often call for higher animal welfare and sustainability for the products they buy. EU pig producers have always been committed to going one step further and improving the level of animal welfare if this was desired, but it must be acknowledged that this comes at a higher cost and needs to be supported by consumers and the market. Still, although animal welfare seems to be a general concern of the consumer, it does not figure among the most important criteria for purchase decisions<sup>6</sup>. With the high concentration in the retail sector, farmers are often obliged to improve their production in a way which will enable better marketing of the products (animal welfare, use of antibiotics, environment). Although the investments for improvements are very high, the retail sector does not always provide a premium for the products it buys from producers, and instead simply interprets adherence to their requirements as a "license" to supply their stores. This approach is not voluntary for farmers and the lack of a premium forces farmers to cover the costs themselves and is not sustainable in the long run.

The EU has tried to counteract market imbalances and unfair practices with the Directive on Unfair Trading Practices, which was welcomed as a very important step for the future of EU agriculture. Unfortunately, the directive has neither been fully implemented in all the MS, nor it is satisfactorily enforced. Some Member States have even decided to go beyond the baseline and have added further conditions, such as a ban on below-cost selling, to the scope of the directive.

### Solutions:

- The implementation of the Directive on Unfair Trading Practices and its enforcement are crucial for the future of the farming sector. It must be ensured that the UTP Directive is fully transposed and implemented, de facto prohibiting the use of unfair trading practices by operators. It must also guarantee that all mechanisms for oversight and enforcement are in place and operational. Penalties should prevent the reoccurrence of unfair trading practices and therefore must have significant financial weight. In this regard, fines should represent a percentage of the business volume of the retailer instead of a lump sum.
- Cooperatives and producer organisations already play an important role in strengthening the position of European farmers. Their development must be further supported, especially in the starting phase of a cooperative, such as support at the technical level as well as for innovation. Legal certainty must be provided to farmers working together in cooperatives, in particular as regards competition policy.

- For private labels, the name of the company producing/processing the products should be communicated to consumers if the company so wishes. The solution could be provided through Regulation 1169/2011 on the Provision of Food Information to Consumers, where mentioning the producing company or processing plant on the front of the packaging must be introduced. The mention of the company that produces/processes the products should account for at least 20% of the front of the package labelling.

- Unfair and unethical business practices must be banned and a transparent mechanism that provides comparative information on the prices paid to producers and by consumers must be put in place. Any operator selling fresh meat must communicate the market price for meat to the consumers for the last 4 weeks using an A3 paper or comparable electronic device, which should be located in the part of the store selling meat. Alternatively, the information could be communicated on the packaging.

- The Commission should support and promote long-term contracts allowing for farmers to work together with legal certainty and a longer-term vision and support and promote contracts with minimum and maximum prices.

## Fair income for farmers

After several year of low prices, even below production costs, the European pigmeat sector has also reached a structural crisis with many farmers leaving the sector and difficulty to attract young farmers. In addition to the market situation and low profitability of the sector, pig production is also known for the hard, physical work and lack of free time and holidays, which are not always fairly reimbursed. Further financial burdens also include substantial financial investments which are required on a regular basis due to the constant legislative changes. Farmers are often abandoned, without the necessary reimbursements from the market. To receive a decent income, they are often forced to either leave the sector and look for a more profitable business or to increase their herd size. Neither of the developments is welcomed by politicians and the European Commission as they both lead to concentration, which the sector is often accused of. To keep the current structure, avoid farm closures and attract young farmers, a reasonable income for the work of European pig producers is needed. A fair share of consumer spending, derived from a better functioning of the food chain, is fundamental for the future of pigmeat producers.

For over a year, we have had to endure extremely low prices below the cost of production. They are especially dramatic in some of the smaller Member States with prices up to 30-40% below those of the most competitive countries. At the same time, European pigmeat producers are confronted with historically high prices for inputs, namely feed (up by more than 40% in most countries), energy, construction materials and equipment. We cannot rule out the possibility of further market disturbance caused by the spread of African Swine Fever (ASF) as well as trade developments. It must be ensured that farmers are provided with liquidity at all times. As the bad market situation of the last years was caused by multiple problems, there is no simple solution. Various measures must be implemented to ensure the resilience of the European pigmeat sector.

### Solutions:

- In case any legislative changes are proposed, and they do not lead to better efficiency of farmers and are not covered by the market, the European Commission should provide investment support to avoid putting the full burden on farmers' shoulders. The Commission must develop and implement investment support mechanisms, including access to credit, to address any additional higher sustainability requirements deriving from legislative changes that are not covered by the market. It must look for technical solutions to improve farmers' ability to adapt to the new legislation with as little cost and effort as possible and simplify the general rules. Any measures must be harmonised across the Member States.

- The situation on the European pig market is fluctuating very strongly. Currently, when the EU pigmeat sectors reaches a crisis, the only solution that the Commission can offer is private storage. Private storage measures can sometimes release the tension on the market and should therefore be kept, but in addition further tools should be developed, not only to resolve the direct impacts but also to provide long-term support to farmers while also taking into account the specifics of the farm. The sector supports the development and implementation of risk management measures such as mutual funds to help producers during market disturbances. Mutual funds would allow farmers to pay in during periods with good prices and then retrieve the funds when they are losing money. How the mutual funds operate would therefore fully depend on the market situation. For example, with 20 EUR profit per pig, the farmer could decide to pay 5 EUR per pig into the fund. When the market situation sways and the farmer would be losing money, the losses can be covered by the mutual fund. The Commission would then double the funds paid out by the mutual fund. The

mutual fund would be open to join for all farmers and lead by many farmers together. The owners of the fund are the producers who pay into it. They can establish a maximum amount of money to be kept in the mutual fund. When the amount of money is exceeded, the capital would be returned to the shareholders depending on the amount of money they have paid in (those with more pigs pay more, those with less pigs pay less). The amount of money paid in to the mutual fund must be exempt from tax to create an incentive for farmers to contribute.

- We should make use of the flexibilities provided by art. 219 of the sCMO and therefore call upon the European Commission to adopt specific market measures in support of the pigmeat sector to be triggered in the event of extreme market disruptions and/or a health crisis.

- Furthermore, the Commission should support farmers when paying into insurance schemes for veterinary accidents and diseases leading to a loss in profitability, as those insurance schemes are very expensive and pig farmers often cannot cover the costs. Insurance schemes covering veterinary incidents and diseases leading to profitability losses should therefore be developed and covered with EU support. Any investment in insurance schemes should therefore be partly covered by the European Commission. The payments are made on a yearly basis to existing insurance companies.

## Trade and market access

EU pig production has a long history that is based on cooperation, precision, and continuous innovation. In third countries EU pork is praised for its good quality. Additional standards on sustainability and animal welfare applied by pig producers in the EU are acknowledged but not remunerated in the form of a premium.

European pig production has been following the demands of European consumers, whose dietary habits have changed significantly over the last decades when it comes to the which pig cuts they prefer. In order to adapt to the local consumers and continue to offer affordable prices, the sector has been forced to search for different markets where they are able to sell specific cuts of pig and generate additional value. In doing so, the EU pig producers contribute to sustainability and circular farming, while reducing food waste in a time of increasing global demand for animal protein.

## Solutions:

- As several cuts of the pig carcass are not consumed in the EU, exports are necessary for carcass balance. Exports to third countries should be maintained and further developed with promotion campaigns financed by the EU. In addition, the EU standards in various areas such as animal welfare, use of antibiotics, and sustainability throughout the process must be promoted.

- In terms of balancing and marketing of the full carcass, the trade flows of pork and pork by-products must be analysed with a focus on the valorisation of the parts that are not consumed in the EU.

- More high-level missions to third countries lead by the Commission must be introduced.

- Currently, trade of pork and pork products is often limited due to the lack of recognition of the regionalization principle in the third countries. The Commission should increase its efforts to solve the SPS problems and ensure the Member States are able to export to third countries.

- A European export credit facility must be introduced to ensure exports to developing countries and markets where there are potential political risks. The instrument already exists in the U.S., is available for agricultural export, and has a WTO-approval. It could be seen as a replacement of the export refund instrument.

- Due to the tighter restrictions and higher production standards ensuing from EU legislation, pigmeat operators are closing their facilities and moving outside the EU with the aim of further supplying the market. This should be considered when developing new legislation with a view to curtailing this trend.

Consistency with other EU policies such as the Green Deal and its strategies must be ensured. Trade must be based on balanced, fair and transparent rules to avoid distortion of competition. In principle, imports to the EU must be in line with the Union requirements for its own farmers, especially when it comes to food safety.

- Trade must be further diversified, and the European Commission must prioritize trade agreements and expansion into new markets in countries to which cuts of pig that are not consumed by EU consumers can be exported.

Over the past months European pig producers have been confronted with skyrocketing prices of inputs, especially feed. This was partly due to various crises such as Covid-19 and the war in Ukraine, but also the strong impact of speculations of large traders, panic buying, and measures introduced by various operators or countries. With the beginning of the war in Ukraine, a country known as “the granary of Europe”, the supply of cereals became scarce. In some European countries grain stocks were only available for few weeks and farmers feared not being able to feed their animals. European pig farmers believe that there are several ways to better prepare the sector for similar events in the future, and one of them is better cooperation and exchange with cereal producers. We would like to propose measures that would improve cooperation and make the sector more resilient in several ways when it comes to its crucial inputs.

Production of grains and protein crops is the basis for animal production, with feed being its most important input. The EU is self-sufficient in the overall production of cereals, but the situation strongly varies between different kinds of cereals and between the Member States. Despite all the efforts to strengthen production, which have been ongoing for decades, the biggest deficit can be observed in the production of protein plants. European farmers continue to supply crops like wheat to some traditional markets, especially in Africa, and import certain other crops, such as soy, from countries with better production conditions, with both climatic and legislative advantages. European pig producers support efforts to prevent deforestation and aim for the feed to be as sustainable as possible. Still, the current feed production capacity in the EU does not allow us to stop imports from South America. This remains our wish for the future and the sector is ready to support the domestic protein production within the limits of its capacities.

Currently in the EU, we produce over 75% of the feed we use for our livestock production ourselves, over 90% if roughage is included<sup>7</sup>. Nevertheless, the majority of the remaining 10% that we import is made up of plant protein. The EU is only able to cover less than 75% of its plant protein needs for feed. Moreover, if we only focus on the plant protein with the highest protein content (30% to over 50% protein content), the EU is only able to supply 30% of its needs<sup>8</sup>.

In the wake of the Second World War, the EU decided to channel its agronomic research efforts into optimising the production of cereals while North America focused on the production of plant protein

such as soy. While this course of action resulted in highly efficient cereal production in Europe, it led to an inability to efficiently produce plant protein and an increasing reliance on imports of the latter. This situation was exacerbated by the 1962 Dillon Round Agreement, in which the EU accepted tariff-free access to its soy markets in return for international recognition of the Common Agricultural Policy. Consequently, the EU does not currently benefit from all the know-how and plant material required to produce enough plant protein to meet its plant protein needs for feed in an economically viable way. To remedy this situation, it is vital that the EU invest in long-term research to develop new farming methods and plant varieties for high-yield plant protein production that is tailored to the different EU climates and landscapes. It is essential for this investment into research to be focused on the long term, because the EU, unlike America, has not invested decades of research into this sector. It is also essential to invest in tools such as new breeding techniques.

It is important to consider how to guarantee the economic sustainability of plant protein production in Europe. The cost and price of European plant protein will have to be aligned with the world price of plant protein so that livestock farmers do not suffer an additional disadvantage on the global market.

In parallel, it is also important to invest in and develop other sources of protein for feed in the EU. The EU has just authorised the use of Processed Animal Proteins (PAPs) for feed - the use of poultry PAPs to feed pigs, pig PAPs to feed poultry, and the use of collagen and gelatine from ruminants to feed non-ruminants. They have also authorised the use of insect PAPs to feed both poultry and pigs, which we highly welcome. EFSA's opinions have demonstrated clearly that the reintroduction of these PAPs is deemed safe if cross-contamination is prevented<sup>9</sup>. Thanks to their high level of protein, PAPs represent a useful alternative to the plant-based protein required for feed. This could therefore help to increase the EU's self-sufficiency in feed protein supply. Nevertheless, the strict rules established to avoid cases of cross-contamination (such as dedicated single-species production facilities) and the issues with the analytical tools to control their enforcement (the methods detect the presence of DNA, but authorised material like pig blood plasma in pig feed can also contain DNA) might stifle the potential of these PAPs.

Furthermore, feed additives are one of the essential elements that allow animal nutrition to help to improve animal productivity, animal welfare and the sustainability of animal production, as well as reduce the use of antimicrobials and the environmental impact of livestock. Therefore, we believe that it is essential to have a regulatory

7. European Commission (2020): Special Eurobarometer 505: Making our food fit for the future – Citizens expectations  
FEFAC (2020): Feed and Food Report

8. European Commission (2021): EU Feed Protein Balance Sheet (forecast)

9. Opinion of the Scientific Panel on Biological Hazards on a request from the European Parliament on Certain Aspects related to the Feeding of Animal Proteins to Farm Animals, The EFSA Journal (2007) Journal number 576, 1-41.

framework that promotes and facilitates the placing on the market of new innovative feed additives as well as maintaining those that already exist.

### Solutions:

- To stabilise the feed market and avoid speculation which artificially inflates the price of cereals, appropriate measures should be taken when necessary.
- To ease the situation on the market, the competitiveness of using raw materials for feed rather than other uses must be ensured.
- To make EU production more resilient and prepare the sector for the future, the storage capacity for raw materials for feed must be increased in the Member States.
- Further support must be provided to cooperatives which should be encouraged in their goal to sell outputs as well as inputs directly to farmers. The Commission should support collaboration through reduced VAT in cases where the raw materials are traded directly between cooperatives and farmers.
- In order to reduce price volatility, support and incentives must be provided to promote mid-term contracts between cereal and pig farmers as well as their cooperatives.
- Domestic protein production must be further encouraged and increased through various means: improved economic viability of production of plant protein for feed in the EU both for growers and breeders; exploration of new sources of protein for feed in the EU; help for feed manufacturers and livestock farmers to use plant proteins for feed more efficiently to minimise the quantity needed.
- Innovation in new breeding techniques must be supported.
- More research into increasing the protein content of the cereals that are being produced in the EU.
- When it comes to the use of PAPs, the Commission must maintain a high level of safety, but also show a degree of tolerance and take into account technical difficulties, and continue to allow the use of other products such as blood products or dairy products. If the use of PAPs is restricted to dedicated facilities only, their sustainability potential will not be harnessed. In this context, it would be important for national authorities to closely monitor the use of PAPs in feed in order to develop concrete solutions on the ground. This will help to develop PAPs use in feed while guaranteeing a high level of safety and thus consumer confidence.

- In addition to PAPs, it is also important for the EU to invest in research and facilitate, from a legal perspective, the development of other sources of protein for feed such as algae, single cell proteins, yeasts, and marine ingredients. There should also be more research and innovation regarding circular raw materials, e.g. by-products from various food production, that can be used for animal feed.

- There is a need for feed additives with beneficial effects related to aspects other than improving animal performance, such as improving animal well-being, reducing livestock emissions that affect the environment, or generally improving the sustainability of animal production. Therefore, we encourage the streamlining of the process to create new categories/functional groups that reflect these new benefits of feed additives and thus provide suitable efficacy criteria.

- EU feed additive end users are completely dependent on imports for some specific feed additives that are not produced in the EU. We believe that this dependency on imports is a major issue that has been exacerbated by the COVID-19 crisis and the related import disruptions. Therefore, we would like to encourage the Commission to take this into account and consider possible solutions.

- Farmers should have access to training to help them optimise feeding with accessible feed materials.



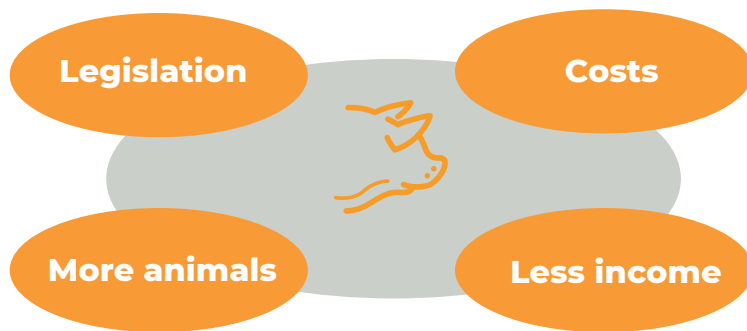
### Social aspects

One of the objectives of the Common Agricultural Policy (CAP) is to ensure that the farming sector receives a decent income and provides a reasonable livelihood. European pig producers have until now benefited from the direct support of the CAP, but some farmers were also able to benefit from the 2nd pillar of the CAP. The European model of production is family-based and especially in the recent years, the difficult situation of the sector has led to a high number of farmers leaving the business, especially from smaller farms.

The low income per animal as well as farmers leaving the business have both contributed to production being concentrated among a lower number of farms but also in specific Member States. This leads to abandonment of rural areas, and is going to continue with the upcoming legislative proposals. Within the European Green Deal and the Farm to Fork Strategy, there are several initiatives that will require high investments at farm level. Proposals on areas like animal welfare and the Industrial Emissions Directive are going to increase the financial



and bureaucratic burden on family-run pig farms and run counter to the aim to strengthen family production. An additional factor in this discussion also concerns the building permits necessary for any new building. Farmers must often wait several years to receive a building permit, which not only delays the innovation in the sector, but also puts substantial pressure on families and business activities, and has an impact on the well-being of the family members. If the work is not done by farmers, production will shift more and more towards large companies.



For the future of the sector it is of crucial importance that the next generations continue the traditions. Currently, only 11% of all farms in the EU are run by young farmers less than 40 years old<sup>10</sup>. There is an urgent need to support generational renewal and young farmers at the beginning of their career. In addition to the difficult economic situation, farmers often face issues when it comes to reconciling their professional activities with their private life. They are unable to take holidays and have difficulties taking sick leave or maternity/paternity leave. In order to make the sector attractive for the next generation, social security for pig producers must be reinforced, and they must be given the possibility to take holidays.

Furthermore, farmers are facing high pressure from society. The word “farmer” is still used as an insult in various languages and when it comes to the reputation of different occupations, farming profession is at the bottom of the list. Farmers are often not welcome in local communities due to the possible impact pig production might have, especially regarding the odour due to the manure management practices. Farmers are seen polluters of the environment instead of being perceived in connection with the food that the population has on their table. This way of thinking and communicating is further exacerbated by politicians, including the European Commission, which casts a negative light on livestock farming and pig production. In the last years, not only was this observed in the public debate, but farmers are also increasingly being

targeted by activist groups which break into farms, without following any biosecurity rules.

The negative general opinion is not surprising, it can be attributed to the general educational system and how farming is presented to the youngest generations. A recent study on this topic from Slovenia<sup>11</sup> analysed various subjects during primary school, i.e. the first 9 years of education from the age of 6 to 15. Agriculture is a broad field, covered in both the natural and social sciences. In the curricula for certain compulsory subjects, there are no teaching objectives that explicitly or implicitly include agriculture. In others, several objectives were identified where agricultural content can be included, if the teachers consider it conducive to the objectives. The main topics included in the curricula were awareness of current and future environmental and social issues, conservation and sustainable management of environment, environmental function of agriculture, pollution of groundwater, soil and surface water, the use of natural resources and sustainable development. Food production can be taught as part of classes on the structure of plants, botany, animals and their reproduction or as an economic activity in the local environment. In some subjects, agriculture is also addressed through food safety, the impact of eating habits on health, the use of by-products and labelling. Instead of the overall focus that lies on agriculture and its environmental impacts, the sector calls for obligatory education on agricultural production, animal welfare and the improvements of the sector, meaning of labelling and value chain.

The lack of knowledge and education was not only observed within the general population, better educational programmes are also needed for young farmers who are taking the first steps into pig production. In many Member States young farmers still do not have access to educational programmes that only focus on pig production, or educational programmes that include the latest innovations in the sector. Knowledge and knowledge sharing will be crucial for the future of pig production in Europe and will help pig farming to adapt to all the upcoming challenges.

### Solutions:

- Incentivise generational renewal and support young farmers setting up in the pigmeat sector using the most adequate CAP support mechanisms.
- As additional motivation and with a view to the future, the education of young pig producers should be improved. It must be ensured that educational programmes in all the Member States are up-to-date, and all young farmers have access to specialized education for pig production.

- The European Commission must ensure that young farmers can benefit from exchanges and exchange programmes although they are not part of university-level education. Exchange of knowledge should be especially fostered in national research centres. AKIS and advisory services should be used to further develop information and support networks for pig producers, including young producers, with exchange programmes and the exchange of best practices.

- The European Commission should create guidelines for Member States on how to include European farming and food production as one of the core elements of the Union in the educational programmes. Farming should also be presented from the perspective of circular economy, animal welfare, labelling and the position in the value chain.

- With education about the sector and raised awareness of the farming practices in the local population, the interest to break into pig farms and target pig producers should decrease. To remedy the current situation, however, substantial penalties for activists that break into farms must be developed on the national level and experience shared between the MS. These incidents create stress for animals and farming families, but they can also be harmful to the health of animals, especially at a time when several animal diseases are spreading across the EU. Therefore, the perpetrators must also be held responsible for any issues that arise on the affected farms.

- Farmers who would like to leave pig production must have the possibility to receive compensation for abandoning the activity. The compensation must be available in all Member States and oblige farmers not to resume the activity for a number of years, not only in their country but also outside it. At the same time, no one else should be allowed to continue the production in the same facilities. This tool could also be applied by farmers in cases legislation requires them to make very high additional investments (e.g. for the removal of pens) which they cannot afford.

- To improve the quality of life of farming families, their social security must be strengthened. The Commission must share examples and support best practices that already exist in some Member States, where farmers can share specialized workers that replace them during the holidays or at times when they are unable to work for health reasons.

- Support for development of pig production in regions with “low density” of pigs and regions where pig farming has disappeared should be provided.

- The Commission should motivate European pig producers and especially young farmers

in the sector by promoting farming and the European farming model. The Commission should acknowledge that pork is part of the traditional European diet and refer to the sector in the way it deserves – as the most sustainable and animal friendly pig production on the world. When speaking about pig production, the Commission should consider the current reality in the sector, also when it comes to farm sizes. The sizes should be put in relation to farm incomes. Farms that can actually provide a viable income to farmers should be promoted.

- The European Commission should introduce a day of European farming and food production. On this day, all schools and kindergartens in the EU should eat traditional European food, of which pork is also a part of, and learn about food production. The day can be enriched with farm visits, which must be supported by funds from the European Commission.

- The European Commission should improve its communication about the pig production and highlight its importance and efforts when it comes to circular economy, healthy soils and soil enrichment through organic fertilisers, the ability to produce high-value proteins, valorisation of by-products etc.



## Climate and environment

European farmers and agri-cooperatives are the first in line to feel the impact of climate change and must cope with the increased costs of adaptation and mitigation. With the political ambition for Europe to become the world's first climate-neutral continent, a holistic approach must be followed. It is fundamental to design sustainable policies and programmes that accompany our farmers and their cooperatives in this transition and recognise the importance of the existing tools. Already today, European pig producers are strongly committed to decrease their impact on the environment. Measures have already been taken at several levels, including the reduction of the amount of feed consumed per animal and better feed conversion rates, which was achieved through a combination of improved genetics, housing, management and health.

European pig farmers support the goals of the European Commission to become an economy with net-zero greenhouse gas emissions and climate-neutral by 2050, in line with the European Green Deal and the EU's commitment under the Paris Agreement. We acknowledge the impact pig production has on the environment and want to further build upon the sustainability of the sector.

Currently the sector is still producing emissions and, although the quantities are not high, we want to look for solutions. We must however take into account that we work with living beings, which means that the emissions are not as easy to reduce as in other sectors.

When it comes to the carbon footprint, the largest share is due to the production of feed, followed by biogenic emissions of pigs. Only a comparatively small share is due to transport of raw materials or feed, the energy used on the farm level or slaughtering and packaging as well as further distribution. In feed production, 32% of the carbon footprint is due to the land use change and deforestation which mostly happens in the production of soybean meal, soy oil or palm oil<sup>12</sup>.

The largest share of emissions in pig production on the farm level (feed excluded) comes from slurry. Slurry has potential for further development with a view to decreasing the impacts of the sector on the environment. When it comes to biogenic emissions from pig production, the majority of the carbon footprint is down to manure management (CH<sub>4</sub> and N<sub>2</sub>O), and only a small share comes from enteric fermentation (CH<sub>4</sub>)<sup>13</sup>. At the same time, manure is a valuable nutrient and a crucial tool for circular production and nutrient availability. European pig producers regret that the use of organic fertilisers requires a lot of bureaucracy, and that they are relatively difficult to use in practice compared to mineral fertilisers. As opposed to organic fertilisers, synthetic fertilisers often originate from outside the EU, which leads to unnecessary transport but also creates another dependency that decreases EU sovereignty in case of crisis.

According to the Farm to Fork strategy, the Commission also aims to reduce the loss of nutrients by 50%, with the objective of reducing the use of fertilisers by at least 20%. The sector's contribution to the goal can be increased through feed. Nutrient losses can be reduced by using products and co-products as feed that are inedible for humans. Using these products to feed animals creates highly nutritious food for humans with elements that would otherwise be lost. This is the case for many inedible parts of crops produced directly for human food (e.g. rapeseed cake) and for food processing co-products (e.g. sugar beet molasses, brewing co-products). However, it is also the case for many co-products of crops produced for uses other than human food such as linseed cake and hemp silage. In this regard, feed actively contributes to reducing nutrient loss by creating nutritious food for humans using products that are unfit for human consumption. In addition, it must also be considered that much higher yields per hectare can be achieved with feed grains than with grains produced for human consumption (food grains).

## Solutions:

- The rules for organic and synthetic mineral fertilisers must be harmonised and treated the same as far as nitrogen levels are concerned. Organic fertilisers of EU origin must enjoy advantages over manufactured solutions from third countries.
- The Commission must support farmers in developing solutions for biogas, which is a form of clean energy. For this reason, the Commission has also developed programmes such as RePowerEU. In practice, farmers are especially struggling to produce biogas. The Commission must encourage Member States to identify suitable locations to establish cooperative-owned biogas plants, where slurry from pig farms can be collected and treated. These projects must be subsidised and at the same time be allowed to sell the electricity produced. Current schemes do often not allow sale, but only permit self-use.
- The Commission should promote the use of solar panels and support the sector to use the surface of barn roofs. This will help the sector become self-sufficient when it comes to energy. Schemes must be developed that enable farmers to install solar panels and pay for them over 10 years.
- As slurry and its management is one of the main sources of emissions in pig production, EU pig producers will commit to covering all slurry tanks and lagoons by 2030 to reduce emissions produced. 80% of emissions produced by pigmeat farms covered by the IED must be captured, while the figure for all remaining pigmeat farms is to be at least 40%.
- Farmers should be reimbursed for the implementation of measures specified in the Low Carbon Label method and the BATs (IED).
- The EU should reinforce its efforts to promote better standards at international level.
- EU policy should promote research into new protein sources including by-products with a view to reducing food waste and thus enhancing the circular economy. In addition, the authorisation procedure for new feed materials must be streamlined without compromising food safety. Finally, it is essential to maintain the possibility of using waste/by-products from the food industry for feed production purposes as long as food safety is ensured.
- The addition of digestible amino acids and enzymes, which increase protein digestibility, as well as PAPs in feed formulations should be supported.

## Animal welfare

The European population is increasingly interested in animal welfare. However, diverse legislation and a lack of practical solutions create an imbalance between investments in animal welfare and economic output. Costs are often not compensated by the market. Furthermore, in several regions, stringent local requirements are in place to reduce the environmental burden in terms of odour, ammonia and particulate matter. Some animal welfare issues, such as giving pigs more space, are conflicting with other sustainability aspects, which leads to higher production costs, higher ammonia emission, and thus either lower farm income or less affordable food. The cross-legislative issues limit farmers' ability to reach some of the environmental goals but also have an impact on the farming sector in practice. For example, the size of the stable must increase in order to improve animal welfare and enable loose farrowing of sows, if the same number of animals should be kept. As a result of this, solutions such as free-range systems are only possible on a small scale. Our strategy aims to enable farmers to invest in animal welfare and to profit from the resulting changes.

It must be ensured that animal welfare legislation is based on scientific evidence and not driven by ideology. All solutions must be tested in real-life conditions to make sure that farmers are not redesigning their stables into something that compromises other aspects of sustainability or animal welfare. When it comes to animal welfare, European pig producers would like to discuss three different points:

### **Castration of piglets**

The castration of piglets is an animal welfare concern. It is widely used across the EU to remove the unpleasant odour from pork, known as boar taint, which may occur when pork from entire males (uncastrated male pigs) is consumed. Castration also prevents sexual and aggressive behaviour in male pigs. It is in the pig producers' interest to avoid and minimise the pain experienced by piglets during the castration process. However, this is often an issue which the farmer is confronted with, but over which he or she has limited control. Conflicts and interdependencies on the market and an uneven distribution of costs and benefits have a significant impact on the production methods, including castration.

In 2010, the European Declaration on alternatives to surgical castration of piglets was agreed upon and signed by 34 stakeholders. It laid down a goal to phase out the surgical castration of piglets without anaesthesia/analgesia by 2018. In order to reach this goal, conditions such as investments in

research on boar taint detection and research into genetics to rear pigs without boar taint were set. While neither the conditions nor the target were met, the declaration has still been a driving force. Farmers are prepared to push on and achieve what was agreed. Different methods of using analgesia and/or anaesthesia before castration have been introduced in several MS.

Examples of these are:

- Inhalation anaesthesia with CO<sub>2</sub> in combination with general analgesia;
- Injection with local anaesthesia in combination with general analgesia;
- Inhalation general anaesthesia with isoflurane in combination with general analgesia;
- General anaesthesia (parenteral);
- General analgesia before and after the castration process.

All products currently available on the market, each with its pros and cons, have shown a positive effect on easing and reducing the pain experienced during castration. Surgical castration is an important issue, and the various products or protocols should not lead to a situation that may result in trade barriers for piglets, meat, and meat products across markets. Therefore, a harmonised EU list of available products and protocols for the use of analgesia and anaesthesia should be made available. At the same time, the availability of these products in different MS and mutual recognition of all the methods must also be ensured. Farmers should be able to apply them when castrating their piglets without any concerns about conflicting trade barriers among the EU-27 Member States' production systems. It is important that farmers are enabled to use these products themselves. As initial investments to provide technical equipment that enables castration with anaesthesia or analgesia are very high, the regulation would need to provide a derogation from the mandatory use of anaesthesia/analgesia at the time of castration for very small holdings.

In some EU Member States, the rearing of entire males has increased over the last couple of years. There are also other technical alternatives to piglet castration such as immunocastration. However, this technique is not yet accepted by certain stakeholders along the supply chain in Europe, nor is it accepted on some third country markets. Farmers must produce what the market and consumers demand.

It is important that the costs of castration are shared within the value chain and do not place an additional burden solely on the farmer. To ensure

this, surgical castration with anaesthesia, as well as other methods such as immunocastration, need to be carried out by farmers after appropriate training, during which they also need to be taught how to use the machinery safely. To allow a farmer to make use of different products, short-term storage of medicines also needs to be allowed on the farm once an appropriate environment has been set up. The veterinarians must be allowed to leave the medicines on the farms.

### Loose housing of sows

According to Council Directive 2008/120/EC of 18th December 2008 which sets minimum standards for the protection of pigs, sows and gilts need to be kept in groups during a period starting from four weeks after service to one week before expected farrowing. The loose housing requirement has applied to all farms since 1st January 2013. Some countries have taken the next steps by introducing requirements for loose housing during the service period, while R&D is working on developing systems for loose housing during the farrowing period.

It is agreed that loose housing improves the animal welfare of the sows as it also improves the sows' ability to express natural behaviour and to move freely. Nevertheless, having the sows in loose housing systems requires highly social animals and could affect other welfare factors. Aggressive behaviour among sows can increase the risk of leg injuries, lameness and early pregnancy losses. Loose housing of sows can also conflict with other animal welfare issues, such as keeping piglet mortality to a minimum during the farrowing period. The calculations based on the costs of piglet mortality, increased workload, weaning weight, higher feed and energy use and capital costs show that loose housing would incur additional costs of €2.40 (confining the sow for four days) to €3.50 (without confining the sow) per reared pig<sup>14</sup>.

The costs of setting up loose housing, including investments and additional labour costs, are not returned by the market, but instead, further increase economic risks due to potentially increased piglet mortality and reduced sow drove performance. Moreover, loose housing in the service and farrowing unit will increase the amount of space needed for the animals and ammonia emissions will rise. This, in turn, will reduce farm income while investment costs will remain very high. Farmers will also run into difficulties due to the different ammonia emission regulations that are already in place in different MS.

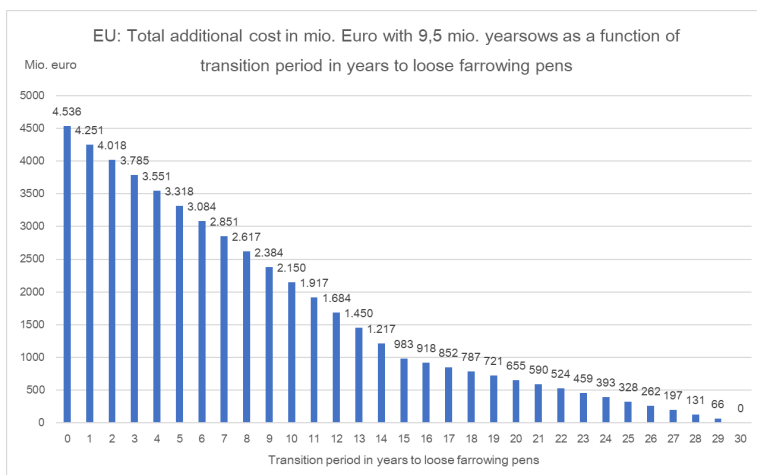
While the European pig sector supports the move towards loose housing of sows, it must stress the major challenges to be overcome in order to accomplish this. It is of vital importance to consider the aforementioned challenges by defining a decent transition period and by granting sufficient

financial support for investments. Setting up loose housing for sows means huge investments for farmers and we are afraid that other actors in the value chain will not sufficiently contribute to covering these higher costs. There needs to be assurances that farmers will receive the support needed for the transition so that all farmers are able to take this step.

### Importance of a transitional period

According to the Copa-Cogeca study, based on data from InterPIG, piglet mortality in loose housing farrowing pens would be 2.5-3% higher than it is currently. Together with other factors like increased need for labour, veterinarians, breeding and other costs, this would bring the total cost per piglet up to between €2.11 and €3.38. This would represent between an additional cost of between €47.7 and €53.1 per sow (incl. finishing).

As underlined above, the sector made large-scale investments in 2013. If the regulation were to change before the end of the depreciation period, farmers would incur losses on their investments in farrowing stock equipment, the renovation of existing stables, etc. In order to provide free farrowing pens, major changes are needed, which would translate to high building costs. In some cases, the new buildings would be more efficient from an economic point of view.



According to Copa-Cogeca's calculation, the appropriate transitional period to introduce loose farrowing is 30 years. Any transitional period shorter than that would incur additional costs which could not be covered by farmers.

European pig producers are prepared to make concessions on the issue if a sufficient transitional period is granted. Should it be shorter than 30 years, grants would need to be made available to cover the extra cost of the depreciation of existing buildings and inventory. Substantial support for investments is crucial. If the transition towards loose housing happens too soon and too quickly

at a time when the market is not yet ready to pay more for pigmeat, imports will increase and take over the European market.

### **Raising pigs with intact tails**

Tail biting is one of the major animal welfare challenges in pig production. Tail biting is considered an abnormal behaviour and a sign of stress which occurs in organic, free-range and conventional pig production systems. Even though the docking of piglet tails causes some pain, it continues to be an important factor in pig production as it helps to reduce injuries due to caudophagy<sup>15</sup>. Tail biting has been linked with many different factors such as pen stocking density, enrichment materials, weather-related factors, pig health, genetics, feed and drinking water supply. Injuries due to tail biting cause even more pain, followed by a high risk of infection in the tail region and abscesses on other parts of the body.

As simply putting an end to the practice of tail docking still holds the potential risk of tail biting, the raising of pigs with intact tails is not only an economic issue. Experience shows that the incidence of tail biting is significantly higher in groups of pigs with intact tails than in groups of pigs with docked tails. According to a study conducted in Portugal, 68.8% of pigs with intact tails suffered at least one injury in their life, while problems were only very minor in the group of pigs with docked tails. With high management effort levels, farmers were able to prevent further biting, but 9.7% of pigs still experienced continued tail biting<sup>16</sup>.

Tail biting is a complex, multifactorial issue and farmers lack guidance on rearing pigs with intact tails that they can apply on their farms. Despite extensive research on tail biting and examinations of risk factors across the EU, no single reliable solution to prevent tail biting has yet been developed and it has not been possible to come up with clear guidelines for farmers on how to successfully manage pigs with intact tails nor how to design and build farms to completely avoid the risk of tail biting.

National research farms (or EU funded pioneer farmer groups) should be tasked with research and cooperation, sharing information between one another. The aim should be to shed light on the different circumstances that trigger tail biting and to develop robust measures and strategies to eliminate the risk of injury to the animals that are practical, feasible and achievable on standard commercial farms. Farmers may participate in this research to verify the success of its findings. All research should be tested using real-life conditions and farmers should be remunerated for their participation.

The European Commission has already increased its focus on finding ways to enforce the pig directive and thereby reduce the frequency of routine tail docking of pigs through national action plans in the member countries. Raising pigs with intact tails has also been a part of special animal welfare schemes in which farmers were financially compensated for the extra costs. Despite increasing EU-wide attention on animal welfare, current initiatives covering a small share of the market are facing challenges on the market as farmers rearing pigs with intact tails are not being compensated. It has therefore been difficult to increase the number of pigs raised with intact tails through market-driven development. The additional costs mostly arise from treatment and intervention, additional enrichment materials and carcasses being rejected. Regardless of the additional costs, farmers are persevering in the move towards this direction.

To include on-the-ground experience, Copa-Cogeca asked its members about their experience with tail biting/tail docking. Two different surveys were conducted: one for Finland and Sweden and another for the rest of the EU. The reason for this was that keeping pigs with entire tails is mandatory in the first two countries. With the study, Copa-Cogeca wants to show the work farmers have put into ending tail docking over the past years.

In the survey conducted in Sweden and Finland, the results showed that there was less than 2% of tail biting in 80% of the herds. Farmers achieved this mainly by making changes to diets, decreasing stocking densities in pens and providing additional enrichment materials. Enrichment materials consist of straw on the floor and straw as bedding in most cases. The greatest problem connected to raising pigs with entire tails for farmers in Sweden and Finland was the increase in production costs.

For the second survey, we received more than 1,800 answers from all over the EU. 81% of herds still have docked tails. In the group of farmers whose herds at least partly comprise of pigs with docked tails, there was a high share of farmers testing out animals with entire tails, which shows that there is progress. Farmers that try to keep pigs with entire tails most often use chains and plastic tubes, wood and suspended, hanging materials. In order to reduce tail biting, they have decreased the stocking densities, made changes to diets and measured and managed gas levels on the farms. They see the increased cost of production as the main problem of keeping pigs with entire tails.

The pig sector supports further research into routine tail docking in addition to the hard work the producers have already done. It is important that a shift towards raising pigs with intact tails allows for sufficient time to implement alternative solutions and to develop incentivising structures or financial

15. Lopes, I. (2020): Efeito da Caudofagia, Amputação de Caudas e Enriquecimento Ambiental em Suinicultura Intensiva. Escola Superior Agrária do Instituto Politécnico de Castelo Branco.

16. Costa Querido, S. A. (2019): Corte de caudas em suínos: da exploração ao matadouro. Universidade de Trás-os-Montes e Alto Douro.

support schemes that will motivate farmers to gain experience with raising pigs with intact tails. European farmers believe that economic incentives to cover income losses and guidelines that could be used on commercial farms are the most important factors that would help them to stop tail docking. The biggest obstacle keeping farmers from stopping tail docking is the fear of an outbreak of tail biting with a huge impact on animal welfare, leading to problems with transporting pigs with bitten tails to slaughter and increased production costs. To take development to the next level, we need a strategy with a set time frame with which we can make step-by-step improvements, giving farmers enough time to implement alternatives. This strategy must also provide the much needed professional infrastructure as well as financial schemes to farmers to invest in raising pigs with intact tails while also acknowledging the efforts which have already been made.

## Transport

Transportation of live animals plays a vital role in maintaining the economic strength and social vibrancy of territories: in many cases, production is mainly located in areas experiencing depopulation in the EU-27. Moreover, production types vary from one Member State to another. Climate, environment and tradition have led to the development of different production models in each region. Transport of animals allows them to be complementary and therefore more sustainable and efficient.

Copa and Cogeca would like to underline the importance of animals being transported in a responsible way and in compliance with current legislation. Animal welfare during transport is also an important aspect of social sustainability and farmers make an effort to meet societal expectations. It is in the interest of all stakeholders involved that all transported animals arrive in a healthy and good condition. Furthermore, we want to help consumers to be able to trust in the high value and quality of the European agricultural and food sector by providing better and transparent communication, either directly from farmers or indirectly through the EU institutions. Such consumer trust also depends on maintaining our high production standards for both animal health and welfare.

Practical experience and scientific research have shown that the main priorities should be the quality of the transport and fitness to travel, rather than the distance<sup>17</sup>. The quality of the environment in the vehicles for animal transport is very important for animal welfare. This includes factors like ventilation, temperature, ceiling height, the nature of the floor, space allowance etc. Copa-Cogeca encourages the Commission to assess long-distance transport in

a holistic manner, considering both the transport of animals for export and the intra-EU transport of animals.

Animal welfare during transport is a very complex area of expertise for which very little science-based research has been carried out. It is important to ensure that all future legislative proposals, on this or any other agriculture-related issue, have a robust scientific basis before any decision is taken at political level in the EU. We would, therefore, encourage the Commission to ask EFSA to conduct further research on the areas where scientific work still needs to be done before any recommendations on legislative proposals can be delivered.

Nowadays, many new technical improvements are available for different forms of transport which improve quality and compliance and animal welfare during the journey. Copa and Cogeca encourage the Commission to take these new technical solutions into consideration in the current revision, which will allow the transport companies to demonstrate transparency and compliance with animal welfare provisions during transport and which also could alleviate some of the administrative burden related to paperwork and other procedures.

Copa and Cogeca would like to address the question of commercial transportation of animals for further fattening and breeding, for instance, over long distances and, in particular, to third countries. Trade of high value breeding stock is crucial, both to ensure continued genetic improvement and to allow our world class genetics, developed within the EU, to be exported to countries all over the world.

Copa and Cogeca believe it is important to continue to focus on international initiatives such as bilateral and multilateral negotiations and cooperation with the WTO, OIE and FAO as there is still a lot of work to be done to ensure mutual understanding on animal welfare.

## Solutions:

### Castration

- The European pig producers believe that it is important that farmers have a choice and can decide on a method of castration or rearing entire males based on their production system and marketing possibilities. In order to tailor the method to the individual farmer and market demands, a harmonised EU list of available products and protocols for the use of analgesia and anaesthesia are needed.

- Immunocastration, surgical castration or rearing entire males are different possibilities that

**17** 17. Results from scientific projects (Hartung et al., 2006; Marahrens et al., 2003) show that the main source of stress is the loading and unloading procedure and not the duration of transportation.

should all be available. Ultimately, the farmer must make the decision on which avenue they pursue according to the marketing possibilities and consumer demands.

- Castration with mandatory use of anaesthesia/analgesia, and a derogation for the very small farms, is something that the WP could aim to achieve under specific conditions (carried out by a farmer, short-term medicine storage).

- It is equally important to continue the work on possibilities to detect boar taint in slaughterhouses. More research into sniffers for the detection of boar taint in slaughterhouses is needed, including machine detection. Feasible solutions could have a strong positive impact on our pig production.

### Group housing of sows in service units and during farrowing

- Farmers across the EU are committed to introducing loose housing systems for sows in the service units with a sufficient transitional period. Loose housing requirements must be combined with the possibility to confine the sows for the first 5 days after insemination. This is important as it can raise the percentage of successful pregnancies and, as a result, farmers' income.

- The sector supports a financially viable requirement for loose housing of sows in the farrowing unit being introduced across the EU with a sufficient transitional period. The requirement for loose housing of sows in the farrowing unit must include the possibility to confine the sows for the first week to minimise the risk of piglet mortality, starting already at the time of the planned birth.

- The transition period must be appropriate and needs to take into account the complexity of the changes. When it comes to the time for the transition, a distinction must be made between newly built and older farms as the state of the infrastructure is likely to vary significantly. The complexity of introducing loose housing in existing farrowing units must be considered. Copa-Cogeca's study found a transitional period of 30 years to be appropriate. Additionally, there needs to be a certain period before the new legislation enters into force which takes into account the lengthy procedures necessary to acquire building and other permits in different member states.

- Currently, any changes to existing farrowing units are very problematic and hard to implement. The design and dimensions of pens for the loose housing of sows are completely different and changes to the handling of manure, the flooring, the feeding systems and the ventilation system

are required. Therefore, a transition towards loose housing of sows is only practical and economically feasible when new farms are built. In order to provide free farrowing and remove the gestation crates, the existing stables would need to be rebuilt completely. All the existing buildings that have already invested in free farrowing and have a farrowing unit of a smaller size should keep using the existing equipment without any disadvantages.

- If a farmer decides to increase the space of the stable(s) to provide a higher level of animal welfare, but does not increase the number of animals kept, there should be no additional bureaucratic burden. The existing building permissions need to cover all the changes that will be necessary to provide loose housing of sows in service units and farrowing units etc. Local authorities and municipalities need to support farmers during this transition.

- Problems arising from factors like ammonia emissions that might increase due to different pen designs and dimensions also need to be considered. There is a linear relationship between ammonia emissions and pen dimensions, which puts the farmer in a situation where there is a conflict between pieces of legislation on animal welfare and environmental issues. The final approval depends on several factors (e.g. the farm's distance to vulnerable natural areas and local communities) which farmers cannot influence. It is therefore essential that the transition towards increased animal welfare includes reasonable environmental regulation at national level. The Commission should support national authorities in minimising barriers.

- To make investments possible, farmers will need to apply for loans which are not always approved due to the sector being in a difficult situation. It is important for pig producers to secure financial support from a common fund as well as the possibility to ask for low-interest loans.

- Installing loose housing for sows in the service unit as well as in the farrowing unit increases costs. So far, this does not generate a profit on the market. As improvements are demanded by society, the goal must be to also achieve a return on investment from the market and also offset continuing costs due to factors such as pig mortality. Therefore, a multi-stakeholder approach needs to be used to develop reliable tools for consumer communication (labelling) and market-driven solutions should be promoted.

- The pig sector calls for the European Commission to initiate a farmer-based programme for developing practical and applicable systems that provide animal welfare for sows and piglets while guaranteeing work safety for employees and delivering an economically sustainable perspective for new as well as for existing farms.

 **Animal health**

- In order to provide practical solutions for farmers, more research with a focus on minimising piglet mortality is needed. The research should cover both piglet and sow welfare, but also ensure work safety for farmers. It will help farmers to have a clear vision of which system to apply on the farm.

### Raising pigs with intact tails

- High involvement of all relevant stakeholders from EU Member States representing the whole value chain must be secured. Participation and shared investment are crucial for ensuring a level playing field and in order to achieve simple, realistic, practical and economically feasible solutions. Farmers must be included at every stage of the case studies. They also need to be carried out in different parts of Europe and translated into all European languages.

- Harmonised implementation of Commission Recommendation (EU) 2016/336 of 8th March 2016 on the application of Council Directive 2008/120/EC must be secured across the Member States defining minimum standards for the protection of pigs concerning reduced tail docking.

- “Pioneer farmer groups” must be established with the aim of working on pilot projects with universities involved with monitoring and assessment tools implemented to study raising pigs with intact tails over a defined period of time. Farm performance has to be monitored and evaluated over a longer period to develop robust measures and strategies that are practically feasible at farm level. The results should be used to deliver robust data for solutions that could be used on a broader range of farms and for commercial use. The need for “pioneer farmer groups” is also supported by the surveys conducted by Copa-Cogeca.

- There should be studies on tail docking carried out in all the EU countries that still practise tail docking. Its results need to be translated into all EU languages. The first step should be the translation of the leaflet with basic information about the need for tail docking provided by the European Commission.

- Development of market incentives for raising pigs with intact tails.

### Transport

- Copa and Cogeca would recommend that the Commission ask EFSA to look into science-based adjustments in this context as a way to improve the quality of transport, rather than focusing only on reducing the length of the journey.

Preserving good animal health and welfare conditions in Europe and ensuring a competitive livestock sector is of interest to society as a whole. Farmers play an essential role in monitoring the health of animals in their care and take appropriate action at the earliest opportunity.

The evolution of the epidemiological situation related to African Swine Fever in the European Union is a great concern to European pig farmers. The Commission has a broad wealth of experience in managing this disease. In light of the recent developments, we would, nevertheless, like to insist upon the most effective tools to not only limit the disease’s transmission but also to work towards its eradication.

To limit the spread of the disease and eradicate it in the long term, we must all work together across different fields. A lot of work has already been done by producers at farm level to increase biosecurity. From our perspective, more could be done on the management of wild boars. In recent years, the wild boar population has been growing at a considerable rate all over Europe. The problem has escalated to the extent where wild boars have spilled out into a great number of rural and urban areas, causing damage even to the general public. We expect this trend to continue. There are also some concerns about the increased adaptability and fertility of wild boars which underlines the urgency of any measure to be taken. The large and growing wild boar population is currently contributing to the spread of the virus throughout Europe, increasing the risk of infection even outside the usual season.

At farm level, European pig producers will continue their investment to increase biosecurity in animal holdings. With the aim of eradicating the disease, Member States should be able to preventively order the culling of domestic pigs if this should help limit its spread. Should such exceptional circumstances transpire, it is important that farmers who suffer directly or indirectly as a result receive fair compensation. We reiterate that this should indeed also include farmers who have not been directly affected by the disease. The support must, at least in part, come from EU funds - as is the case with other measures - due to a particular need for coordinated EU action to grapple with ASF.

### Solutions:

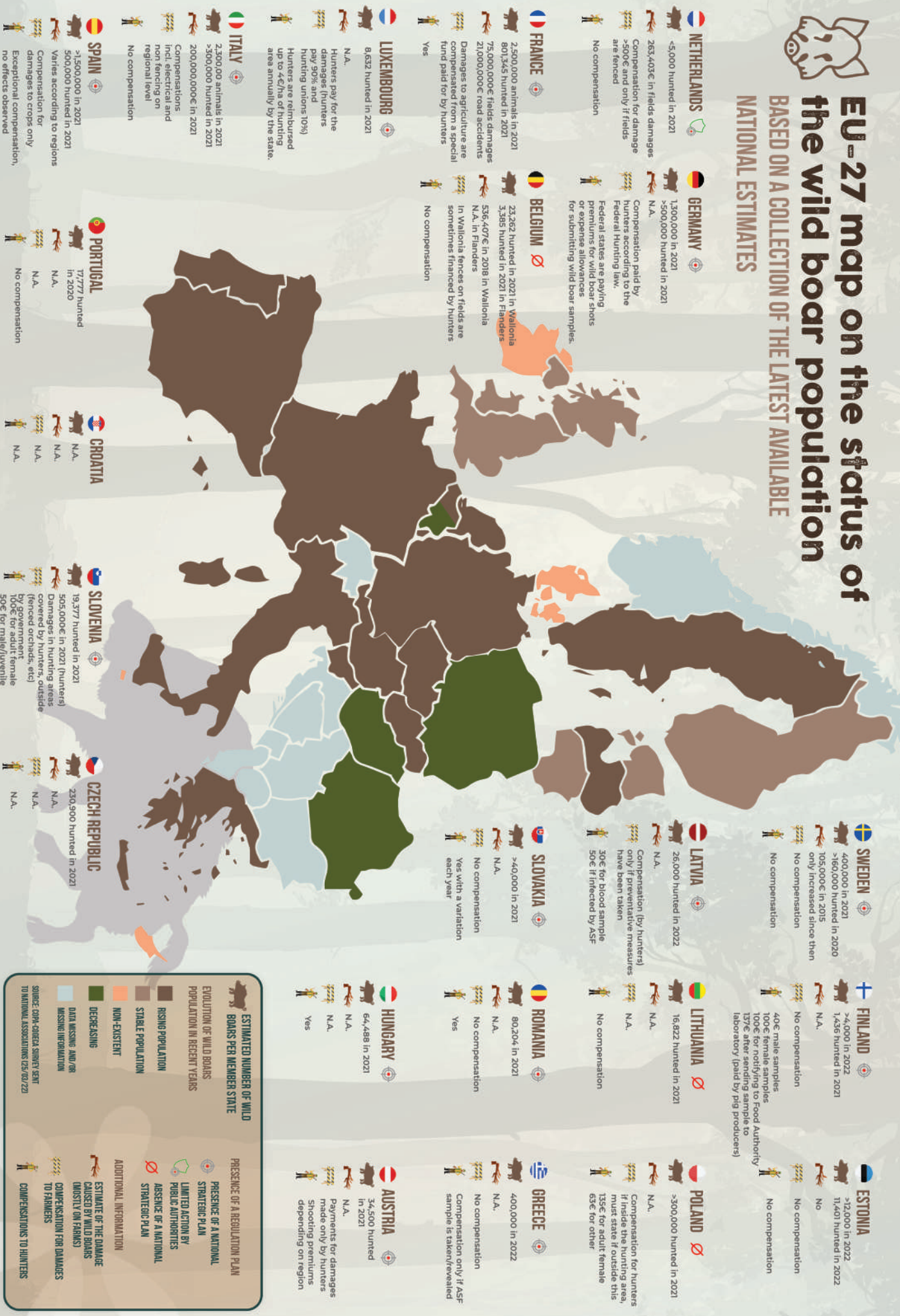
- A general definition of biosecurity on pig farms must be developed and applied throughout the EU.

- It is urgent that robust and mandatory



# EU-27 map on the status of the wild boar population

BASED ON A COLLECTION OF THE LATEST AVAILABLE NATIONAL ESTIMATES



**ESTIMATED NUMBER OF WILD BOARS PER MEMBER STATE**

**EVOLUTION OF WILD BOARS POPULATION IN RECENT YEARS**

- RISING POPULATION
- STABLE POPULATION
- NON-EXISTENT
- DECREASING
- DATA MISSING AND/OR MISSING INFORMATION

**PRESENCE OF A NATIONAL STRATEGIC PLAN**

- PRESENCE OF A NATIONAL STRATEGIC PLAN
- LIMITED ACTION BY PUBLIC AUTHORITIES
- ABSENCE OF A NATIONAL STRATEGIC PLAN

**ADDITIONAL INFORMATION**

- ESTIMATE OF THE DAMAGE CAUSED BY WILD BOARS (BASED ON FARMS)
- COMPENSATION FOR DAMAGES TO FARMERS
- COMPENSATIONS TO HUNTERS

SOURCE: CPMA, CEMEA, SIBREX, SENT TO NATIONAL ASSOCIATIONS (25/02/2022)

- NETHERLANDS**
  - 45,000 hunted in 2021
  - 263,403€ in fields damages
  - Compensation for damage >500€ and only if fields are fenced
  - No compensation
- FRANCE**
  - 2,500,000 animals in 2021
  - 801,345 hunted in 2021
  - 75,000,000€ fields damages
  - 21,000,000€ road accidents
  - Damages to agriculture are compensated from a special fund paid for by hunters
  - Yes
- LUXEMBOURG**
  - 8,632 hunted in 2021
  - N.A.
  - Hunters pay for the damages; hunters pay 90% and hunting unions 10%
  - Hunters are reimbursed up to 4€/ha of hunting area annually by the state.
- ITALY**
  - 2,300,00 animals in 2021
  - >300,000 hunted in 2021
  - 200,000,000€ in 2021
  - Compensations incl. electrical and non fencing on regional level
  - No compensation
- GERMANY**
  - 1,300,000 in 2021
  - >500,000 hunted in 2021
  - N.A.
  - Compensation paid by hunters according to the Federal Hunting law.
  - Federal states are paying premiums for wild boar shots or expense allowances for submitting wild boar samples.
- BEELGIUM**
  - 23,262 hunted in 2021 in Wallonia
  - 3,395 hunted in 2021 in Flanders
  - 536,407€ in 2018 in Wallonia
  - N.A. in Flanders
  - In Wallonia fences on fields are sometimes financed by hunters
  - No compensation
- PORTUGAL**
  - 17,777 hunted in 2020
  - N.A.
  - N.A.
  - No compensation
- CROATIA**
  - N.A.
  - N.A.
  - N.A.
  - N.A.
- SLOVENIA**
  - 19,377 hunted in 2021
  - 505,000€ in 2021 (hunters)
  - Damages in hunting areas covered by hunters, outside (fenced orchards, etc) by government
  - 100€ for adult female 50€ for male/juvenile
- CZECH REPUBLIC**
  - 230,900 hunted in 2021
  - N.A.
  - N.A.
  - N.A.
- SWEDEN**
  - 400,000 in 2021
  - >160,000 hunted in 2020
  - 105,000€ in 2015
  - only increased since then
  - No compensation
  - No compensation
- LATVIA**
  - 25,000 hunted in 2022
  - N.A.
  - Compensation (by hunters) only if preventative measures have been taken
  - 30€ for blood sample 50€ if infected by ASF
- SLOVAKIA**
  - >40,000 in 2021
  - N.A.
  - No compensation
  - Yes with a variation each year
- FINLAND**
  - >4,000 in 2022
  - 1,436 hunted in 2021
  - N.A.
  - No compensation
  - 40€ male samples 100€ female samples 137€ after sending sample to laboratory (paid by pig producers)
- LITHUANIA**
  - 16,822 hunted in 2021
  - N.A.
  - N.A.
  - No compensation
- ROMANIA**
  - 80,204 in 2021
  - N.A.
  - No compensation
  - Yes
- HUNGARY**
  - 64,488 in 2021
  - N.A.
  - N.A.
  - N.A.
  - Yes
- ESTONIA**
  - >12,000 in 2022
  - 11,401 hunted in 2022
  - No compensation
  - No compensation
- GREECE**
  - 400,000 in 2022
  - N.A.
  - No compensation
  - Compensation only if ASF sample is taken/evaluated
- AUSTRIA**
  - 34,500 hunted in 2021
  - N.A.
  - Payments for damages made only by hunters
  - Shooting premiums depending on region
- POLAND**
  - >300,000 hunted in 2021
  - N.A.
  - Compensation for hunters if inside the hunting area, must state if outside this 135€ for adult female 65€ for other

wild boar management schemes are enforced to limit the impact wild boar populations have all throughout the EU. We take the view that all national governments should enact a wild boar management plan to substantially reduce their population. Putting such wild boar management plans into practice is already obligatory in affected countries, but additional action should be encouraged as a pre-emptive measure in areas where ASF has not yet appeared.

- We encourage the sharing of knowledge and best practices between MS regarding the implementation of wild boar management plans. According to the most recent scientific data, hunting should be avoided in current ASF-affected zones but increased elsewhere, making sure to apply high biosecurity standards.
- A wide range of hunting measures should be allowed in all Member States including, for instance, traps and infra-red lights as part of a broader toolbox of effective measures which can be readily applied. Further information campaigns should be launched in order to raise awareness amongst hunters and their organisations.
- The Commission must also continue to support the fight against the disease in third countries.
- As well as wild boars, humans are another main vector through which African Swine Fever is spread across Europe. This is why we support and encourage the Commission, in close cooperation with affected Member States, to ensure all different outdoor activities (e.g. mushroom picking, trekking, hiking, etc.) performed in forests located in the affected areas are controlled.
- Measures such as the possible removal of dead animals from the forest, but also additional ones taken at farm level, including training opportunities and knowledge sharing, must be supported.
- Although the meat coming from animals affected by the disease does not pose any threat to human health, stricter controls must be implemented on the flow of meat from affected regions in relation to seasonal workers and other travellers to contain the spread of disease. Citizens should also be made aware of other factors to which the spread of ASF may be ascribed, namely discarded pork-based cold cuts and the role of transport.
- In the interest of keeping export channels open, we would like to ask the Commission to continue its efforts in ensuring third countries recognise the principle of regionalisation.
- The European Commission must continue its work and research when it comes to development

of a vaccination against ASF for wild boars especially through “oral vaccines”.

## Antimicrobial resistance

Increasing antimicrobial resistance is one of the most sensitive topics in relation to human and animal health as well as the environment. It is a serious concern both in Europe and worldwide. Antimicrobial resistance is strongly connected to the amounts of antimicrobials used. A firm commitment to biosecurity and hygiene as tools for disease prevention must be endorsed by all stakeholders. It is clear that a “One Health” approach is important for all health stakeholders in the EU (both for humans and animals) and everyone must play their role in controlling and reducing antimicrobial resistance in Europe.

Healthy animals do not need antimicrobials. Based on the principles of “prevention is better than cure” and “as little as possible, as much as necessary”, improving animal health by other means rather than treatment is one of the best ways to reduce the need for antibiotic treatment. We also want to mention that veterinary supervision of animals and products is an essentially safe tool and significant progress has been made in 4 legislative matters at EU level over the past few years. The development of innovative and/or improved preventive technologies (e.g. vaccination) by the industry has expanded and also improved the possibilities to avoid disease outbreaks in EU territories in the future. Furthermore, epidemiological surveys of animal health ensure that adequate devices are put in place to monitor the risks linked to pathogenic agents which threaten the territory.

As set out in the Farm to Fork strategy, the Commission intends to reduce overall EU sales of antimicrobials by 50% for farmed animals by 2030. The latest ESVAC report published in 2021 shows that the volume of sales of antimicrobials for use in food-producing animals in Europe fell by more than 43% between 2011 and 2020<sup>18</sup>. At the same time, the use of antimicrobials is increasing in the rest of the world<sup>19</sup>. The use of antimicrobials in the EU was minimised with help of very high legal requirements that require a prescription and supply of antimicrobials by a veterinarian after an examination and banned the use of prophylaxis. There is further legislation that reserves some antimicrobials for humans only. Moreover, the EU is one of the only places in the world where the use of antimicrobials for growth promotion is banned (since 2006).

Still, it is crucial that all animals that become sick and need to be treated receive the treatment for both health and welfare reasons. Farmers do not want to use antimicrobials if the animals do not absolutely



need them. Antimicrobials are an unnecessary cost and, in addition, affect the well-being of animals and their immune system. If possible, instead of using antimicrobials and other treatments, the focus should be on the development of vaccines and their use whenever possible. Although the consumption of antimicrobials is decreasing, it remains important that new antimicrobials and other types of veterinary medicines be developed. In the last 15 years, the development of new antibiotics has been very slow which is not acceptable and poses a threat to the development of antimicrobial resistance and the 'One Health' approach. More emphasis must be put on this aspect.

In addition, feed can actively contribute to reducing the use of antibiotics and, in turn, antimicrobial resistance. For example, feed with appropriate nutritional inputs can limit stress and aggressive behaviour in animals or enable better management of feed transition and its potential effects, which then improves animal health and welfare and reduces the need for antibiotics.

The European farming sector can be praised for its great biosecurity and good management practices with regular monitoring of animal health and welfare that have contributed to the reduction in use of antibiotics as well as in the prevalence and spread of disease. Furthermore, breeding selection has helped to increase the resilience of pigs. Investing in new technologies and innovation will help further reduce the use of antimicrobials and avoid losses through precision farming systems.

### Solutions:

- The Commission must put a greater emphasis on action at a global level as antimicrobial resistance (AMR) travels across borders internationally. Banning the use of antibiotics as growth promoters is not only an ethical concern, but a crucial part of our efforts to achieve the objectives of the 'One Health' approach. Compliance with this approach should be a factor for consideration with products imported into the EU. The sustainable use of antimicrobials should also be promoted at a global level.

- It must be ensured that all the farmers have access to veterinary services adapted to the type of animal and which are of a good quality at an affordable price.

- The Commission must communicate not only on the developments the sector must make but also on the past achievements. In the case of antimicrobials, communication on the significant drop in the use of antibiotics over the last 10 years must be strengthened and included in the framework of the "One Health" approach next to

the use of antimicrobials in humans.

- The emphasis should be on a risk-based approach with particular attention paid to antibiotics which are important for treatment in humans or are associated with a high risk of (cross-) resistance as opposed to an all-encompassing focus on general antibiotic use. They should be assessed through a consequence analysis examining the relationship between reduced usage and AMR. It is important that a 'One Health' approach is aimed at targeting efforts where the impact potential to reduce AMR in humans is highest. By adopting action plans targeting the effect on AMR in humans and animals, reducing AMR will follow a more science-based approach.

- The applied research must be strengthened. There is a need for development aimed at improving overall health, disease prevention, biosecurity alternatives to antibiotics (incl. vaccines), new diagnostic tools and health monitoring. All those factors can contribute to improved health in animals and a decreased need for medication. The Commission should support the development of new medicines, including antimicrobials, and creating alternatives to (existing) antimicrobials.

- The Commission should also encourage research and innovation for feed and how improving the management of feed transitions or appropriate nutritional inputs can limit stress and aggressive behaviour in animals as well as contribute to the fight against antibiotic resistance and animal welfare.

- Finally, we would suggest that more focus be put on knowledge transfer and drawing on practical experiences from countries that already have a low-level usage of antimicrobials to aid countries still with a high-level usage.



### Research and development

Research and innovation are crucial to develop and provide innovative tools and solutions for European farmers and their cooperatives and help them improve their productivity and adapt to climate change while reducing the impact on the environment. In particular, research and innovation will play a central role in ensuring an effective transition to sustainable practices, by identifying and optimising solutions that can be rapidly scalable, testing new ones and improving and optimising existing ones that have already led to tangible results in the efficient management of natural resources.

The multi-actor approach plays a crucial role in

the uptake of innovation, following an interactive innovation model whereby farmers and key stakeholders are involved from the beginning of research. The same should count for all other innovation activities alongside adequate investment in technologies, investment in broadband (including reliability), interoperability, digital skills and advisory services, digital innovation hubs, new business and governance models. Access to up-to-date technologies is a key factor in keeping European agriculture competitive on a global market and in maintaining our high standards.

Today, there are a number of cutting-edge technologies that are currently not being utilised to their full capacity by the EU and we risk falling behind the rest of the world on new breeding techniques, for example. We cannot afford to lose time by refraining from using cutting-edge technologies such as new animal breeding techniques, artificial intelligence and digital technologies. In particular, new breeding techniques (NBTs) could improve the tolerance of disease resistance of animals.

In order to keep the position of European pig production in the world, co-creation and collaboration between academia and farmers are vital. Over the years, cooperation between universities and scientific experts has increased, however more emphasis and substantial more investment is needed. At the same time, we stress the need for more emphasis on farmer-driven and EU-based actions as the farmers are the ones in charge of delivering solutions and taking care of their livestock daily. Motivating front-runner farmers to participate in development projects will enable us to develop more general solutions to be applied on all farms. Here, standardisation and proof of concept will be necessary for creating transferable solutions for animal welfare. At the same time, it is important to acknowledge that the markets in MS are different and the consumers often demand different products or product characteristics.

The existing scientific research that tackles pig farming including the research supported by the Commission is not tested using real life situations. An article or a study is often considered successful based on the number of citations or publications and not on the commercial solutions it contains. Pig production is facing challenges on a number of different fronts and is in desperate need for solutions on environmental issues, animal health and welfare. To help the sector, EU funded projects must be based on practical and economic knowledge and approaches.

### Solutions:

- Farmers and the pig industry should be involved in EU-funded projects that aim to support the sector to ensure that the proposed solutions are

practical and useful for farmers.

- The Commission must organise dedicated programmes for applied commercial research with heavy involvement from the farming sector.

- The Commission must establish a dedicated research council/advisory board of farm industry representatives to verify and support the decisions on future calls and ensure they will prove valuable for overcoming practical challenges.

- In European project rating systems, an “applicability of project results” score could be introduced in addition to a more traditional scientific evaluation.

- The calls that the European Commission is organising today are very complicated and it is typically only academics who have time to prepare and organise for this kind of project. The European Commission must propose shorter calls that require fewer participants and entail less of an administrative burden.

- EFSA must not only draw upon scientific knowledge and articles, but also practical knowledge from researchers, experts and farmers with lived on-farm experience.

- The European Commission and EFSA should use an integral approach in legislation and research. Themes like free farrowing are not only about animal welfare, but also climate impact, farmers’ welfare, economics and other topics like raising pigs with entire tails. The complexity of the questions must be recognised.

- EFSA must organise public hearings for its opinions and answer the questions of the public. Its work as well as the responses to the hearings must be transparent.

- EFSA opinions must include overall economic impacts.

- The Commission must provide an overall impact assessment of the Green Deal and the Farm to Fork on European agricultural production including the sector of pigmeat. The synergy and clashes between single proposals must be analysed.

- The Commission must act proactively and look for solutions when it comes to innovation and new technologies.



### Relationship to consumers

Agricultural products are an essential source of

different nutrients needed for good health and they are much more than just energy, salt, sugar or fat. They include different vitamins, fibres, essential amino acids, crucial fatty acids, and minerals such as calcium, iron, magnesium, potassium, phosphorus, selenium or zinc. Consumers are probably quite often unaware of the benefits of including agricultural products in a nutritious, balanced diet or they do not have enough time to cook.

Education is of course important and we strongly believe that it has a tremendous impact on food choice and dietary habits. A balanced diet provides an excellent basis for getting into the habit of eating ingredients that are needed to stay healthy. This means eating a wide variety of foods in adequate proportions to achieve and maintain well-being, vitality and high living standards. The public is often confronted with misinformation or strong marketing campaigns of market players producing ultra-processed food that may influence the public's perception of their products. On the other hand, pigmeat is often perceived as unhealthy and unsustainable.

Consumers do not only lack information and understanding of what a balance diet is, but are also not well informed about the existing legislation and high standards that EU farmers already follow, especially compared to third countries. Any discussion on animal welfare should make reference to the additional costs that will impact the final price for consumers. Legislation is pushing farmers to make investments on a regular basis without factoring in the financial burden and long-term orientation with investments that need decades to be paid back.

Furthermore, after the years of advertising, public perception changed to believe "small is beautiful" and only small-scale production can be sustainable. The idea was further promoted through politics, especially at EU level. In such discussions, the issues of farm-level income and the working conditions of farmers were often overlooked.

A solution to some of the issues is food labelling, which should provide consumers with coherent and transparent information in order to enable them to make informed choices. Indeed, several EU labelling rules already exist with the aim of establishing a level playing field for many different provisions.

Nevertheless, in recent years, many plant-based products have been identified in the market as using names of products of animal origin. In addition to using these terms, food business operators also devise strong advertising or marketing strategies that in many cases mislead consumers by seeking to market these vegan or vegetarian products as substitutes for products of animal origin. We

consider it to be of utmost importance that existing labelling or denomination provisions be revised to further protect the use of these customary and traditional terms. Consumers are, of course, entitled to choose the products that they wish, but they need to be able to base their choice on reliable information that fairly reflects product characteristics. It is important to bear in mind that every food product has its specific ingredients and its own nutritional properties and characteristics. This is why the use of the same term by products from different food categories should be avoided for the sake of fair competition and transparency towards consumers.

Debates around livestock and meat consumption are on the rise in Europe as well as in other western countries. Moreover, the development of lab-grown meat is progressing as is the first official application for lab-grown meat as a novel food. Once an application is filed and it is deemed safe to distribute the product, an evaluation of between 18 months and 2 years shall ensue before it is officially approved and can be marketed on the EU market. A push for synthetic, lab-grown meat can be noticed from different opinion leaders outside of the farming community. Synthetic meat production is strongly promoted by tech tycoons among others, who have made powerful statements in favour of synthetic meat and are actively investing in the sector as they view it as offering potential solutions to environmental challenges. We believe that lab-grown meat must be debated in public fora so that all social, environmental, economic and public health impacts are publicly known. To say that a diet free of "real meat" and a Europe without livestock are answers to the challenges posed by climate change is inaccurate and could prove catastrophic for our nutrition, our territories, our environment, diversity and cultures.

In discussions, one thing which is often overlooked is how livestock farmers, especially in Europe, are long-term adopters of innovation and are taking action, using technology and other solutions, to improve the sustainability of their operations and the welfare of their animals. We must consider, in terms of health, the complex nutrients naturally found in meat which would be hard to replicate. Similarly, it is also incumbent on us to consider the food security concerns that a shift to synthetic meat could generate in countries relying on our livestock and meat exports, not to mention the growing imbalance it could create between the different players of the supply chain or the impact it could have on meat protein affordability for consumers. Furthermore, assessing all the social, environmental and economic aspects related to an abandonment of the European livestock sector is an extremely complex process, even for agricultural and animal scientists. Today, livestock is a key component of rural Europe.

The livestock sector contributes substantially to the European economy (€168 billion annually, 45% of the total agricultural activity<sup>20</sup>), to the trade balance and creates employment for almost 30 million people<sup>21</sup>. Without livestock, the rural exodus would accelerate, putting additional population pressure on our cities and fuelling a greater disconnect with nature and our cultural heritage. The synthetic meat revolution that is envisioned will not be an open-source system. Synthetic food will be highly engineered, ultra-processed and developed through patents. It is therefore certain that a “100% synthetic meat” society would be a society in which production would be concentrated, relocatable and detached from nature and rurality. If philanthropy guides the idea of a livestock-free society, then it must also share patents and technologies with everyone, especially developing countries. Rural Europe would be depleted and food production concentrated in the hands of a few food tech companies.

From a climate change perspective, a world without livestock would likely not be the world we are aiming for. Without ruminants, the maintenance of our pastoral meadow and hedgerow landscapes would become extremely difficult in Europe. Livestock regulates the ecological cycles, closes the nutrient cycle and improves soil fertility and carbon sequestration by recycling and using manure as a bio resource and using grasslands not suitable for crops. In mixed crop and livestock areas, grassland rotations also have the function of cutting off the cycle of crop pests, allowing farmers to reduce the use of pesticides. In addition, there has been little evaluation of the carbon footprint of synthetic meat alternatives which may not prove to be as good as first expected.

**Solutions:**

- Denomination terms related to dairy are already protected in EU legislation and must be respected by all supply chain partners and fully enforced by all competent authorities of the EU Member States at all times. In the case of other terms linked to products of animal origin such as pigmeat and related products, this protection should be granted by EU legislation to ensure the same level of fair competition and transparency to prevent food production from being exclusively managed by a few companies producing ultra-processed products without any added value to farmers. Some Member States such as France and third countries like South Africa have already advanced on this topic.

- The Commission should support information

campaigns that underline the relationship by costs due to various aspects (animal welfare, biosecurity, farm size) and the prices on the market. Should legislation be toughened, what is entailed in a shift to higher levels of welfare must also be publicly communicated.

- The EC must work on solutions for increased product traceability for consumers.
- Pork is part of a healthy diet.
- Pigmeat is white meat<sup>22</sup> and constitutes part of the European diet as a source of high quality and affordable protein around the world.

20. Animal task force (2017): Why is European animal production important today?

21. Animal task force (2017): Why is European animal production important today?

22. Directorate General for Agriculture and Rural Development (2004): The meat sector in the European Union The meat sector in the European Union - Publications Office of the EU (europa.eu)



**copa\*cogeca**

european farmers      european agri-cooperatives

61, Rue de Trèves  
B - 1040 Bruxelles

Telephone 00 32 (0) 2 287 27 11  
Telefax 00 32 (0) 2 287 27 00

[www.copa-cogeca.eu](http://www.copa-cogeca.eu)

**Copa and Cogeca are the united voice of farmers and agri-cooperatives in the EU.**

Together, they ensure that EU agriculture is sustainable, innovative and competitive, guaranteeing food security to half a billion people throughout Europe. Copa represents over 22 million farmers and their families whilst Cogeca represents the interests of 22,000 agricultural cooperatives. They have 66 member organisations from the EU member states.

**VP(22)3754**