

Draft report on a global survey on private standards, codes of conduct and guidelines in the livestock sector

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Abbreviations and acronyms

ADM	Archer Daniels Midland Co.
CAC	FAO/WHO Codex Alimentarius Commission
CODE-EFABAR	Code of Good Practice for Farm Animal Breeding and Reproduction Organisations
CTE	Committee on Trade and Environment of the WTO
GFSI	Global Food Safety Initiative
HACCP	Hazard Analysis and Critical Control Points
IIED	International Institute for Environment and Development
IMF	International Monetary Fund
IPAM	Instituto de Pesquisa Ambiental da Amazônia
NGO	Non-governmental organization
OECD	Organisation for Economic Co-operation and Development
OIE	World Organisation for Animal Health
SEFABAR	Sustainable European Farm Animal Breeding and Reproduction
SPS	Agreement on Sanitary and Phytosanitary Standards
SQF	Safe Quality Food
TBT	Agreement on Technical Barriers to Trade
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNIDO	United Nations Industrial Development Organization
WHO	World Health Organization
WTO	World Trade Organization

1. PRIVATE VOLUNTARY STANDARDS IN THE LIVESTOCK SECTOR

1.1. Introduction and definitions

In recent decades private standards have become a key element of governance in global agro-industrial food chains, progressively influencing both domestic business and international trade (OECD, 2007; UNCTAD, 2007). The key drivers for increasing both public and private control in agri-food value chains include (Liu, 2009; Henson and Humphrey, 2009):

- globalization of trade and advances in information technology.
- reforms of food safety regulatory systems as response to a series of food safety crises (bovine spongiform encephalopathy, dioxin, melamine etc) and increasing consumer anxiety.
- changing consumer preferences and heightened interest among consumers and businesses in food production processes and changes in their conceptions of food safety and quality;
- concentration in the food processing and retail industries.
- company competitive strategies around provenance, environmental and social impact (“credence characteristics”).
- increasingly globalized and complex food supply chains that cut across multiple regulatory jurisdictions, countries and actors.
- regulatory changes in major markets in developed countries, often devolving responsibility for ensuring food safety from the state towards the private sector.

Private standards refer to a wide range of principles that are usually developed by the private sector, mainly retailers, sometimes restaurant chains, but in some cases also by producers or other operators along the chain, as well as civil society organizations. The majority of private standards address food safety, but in addition, also provide businesses with a basis for product differentiation. They are increasingly monitored and enforced through third party certification.

Member governments responding to a questionnaire circulated by the World Trade Organization (WTO) about the effects of SPS-related private standards circulated in 2008, indicate that fresh, chilled or frozen meat (both bovine and poultry) are among the exported animal products most often identified as being affected by private standards (along with fresh fruits and vegetables) (WTO, 2009a; WTO, 2009b).

Private standards can refer to other aspects of *intrinsic* food quality, such as geographical provenance. They can also incorporate aspects pertaining to the ethical dimension of food quality, production and processing, labour and social rights, a fair return to producers, environmental impacts and animal welfare. One of the defining characteristics of private standards, particularly as they relate to food safety, is an increasing focus on the processes by which food is produced. In this respect, they mirror the increasing importance of process standards in public regulations, as exemplified in the increasing use of HACCP in regulations relating to matters such as food hygiene (Henson and Humphrey, 2009).

It is important to distinguish between five different functions that are involved in standard schemes: standard-setting; adoption; implementation; conformity assessment; and enforcement. These can be carried out by a variety of public and/or private entities, according to the nature of the standard. The FAO/WHO Codex Alimentarius Commission (CAC) and the World Organisation for Animal Health (OIE) are primarily concerned with standard-setting and with establishing meta-rules for governments to follow when introducing national

regulations. Much of the work of private standards schemes is concerned with detailed rules concerning implementation and conformity assessment.

Henson and Humphrey (2009) and WTO (2007) identify three main categories of private standards. Some of these standards are specifically designed to establish claims about food from particular countries or regions.

- Collective international standards designed to be adopted (required or used) by organizations in different countries (e.g. GlobalGAP, standards initially developed by European retailers to reassure consumers about how food is produced on the farm by minimizing detrimental environmental impacts of farming operations, now adopted worldwide).¹
- Collective national standards set by organizations that operate within the boundaries of individual countries, including industry associations and non-governmental organizations (NGOs), often in response to concerns over social and environmental conditions (e.g. The Farm Assured British Beef & Lamb² (in the UK) and the QC Emilia Romagna (in Italy), schemes that claim superior attributes (safety, quality, environmental impact, etc.) of products that conform to these schemes.
- Company-specific standards that are developed internally and apply to the whole supply chain of a company (e.g. in June 2003 McDonald's Corporation, the single largest buyer of meat in the United States, required its meat suppliers to phase out the use of medically important antibiotics as growth promoters).

1.2. Examples of private standards

A number of public voluntary food safety/quality standards have been developed by national or local authorities in close collaboration with industry. For example, the "Label Rouge" was initially developed by the French Government. The Safe Quality Food (SQF) series of private standards was originally developed by the Government of Western Australia before being acquired by an industry organization. The "Code of Good Practice for Farm Animal Breeding and Reproduction Organisations" (CODE-EFABAR) which is applied by many European-based breeding organizations addresses the issues of food safety and public health, product quality, genetic diversity, efficiency, environmental impact, animal health, animal welfare, and breeding and reproduction technologies. CODE-EFABAR follows the principles of sustainable breeding as they have been jointly developed by scientists and industry, animal welfare organisations, ethicists, economists and sociologist in a European Commission funded research project³. Another example is given in Box 1.

Box Aliança da Terra, Brazil.

Aliança's main objective is to fill a leadership vacuum left between the trenches of the environmental movement and Brazil's production sector. The alliance works to create economically viable and acceptable conservation solutions. The programs include a registry of landowners who practice sustainable forest management, and a product certification for beef produced from environmentally friendly cattle ranches. The group currently has 305 producers on board in eight states throughout Brazil and also is expanding into other South

¹ <http://www.globalgap.org/>

² <http://www.saiglobal.com/assurance/Food/LivestockPoultry/FarmAssurance.htm>

³ <http://www.effab.org/LinkClick.aspx?fileticket=sNQGDFm62iw%3d&tabid=63>).

American and Latin American countries. To date, more than 6.7 million acres are enrolled in the project, an area expected to double over the next two years. Alianca partnered with IPAM (Environmental Research Institute of the Amazon), a scientific institute in Brazil, to form a socio-environmental registry called CCS. Landowners receive a complete environmental assessment of their properties to help them make management decisions that bind production with conservation. In 2008, Archer Daniels Midland Co. (ADM) partnered with Alianca to launch Doing It Right. The program aims to increase farmer profitability while reducing the environmental impact of their operations and helping to ensure good working conditions for farm employees. The pilot phase of Doing It Right began in December 2008, and today, more than 580,000 acres are registered in the program. ADM covers the costs for producers to come into the system and then provides technical assistance. Rabobank is also on board with Alianca's missions, footing the bill to reforest land. Contractually, the firm becomes the owner of any carbon credits generated from the reforestation. Producers could make back maybe 1% of reforestation costs, so an extra incentive is needed to get them to comply with the law. (available at <http://www.feedstuffsfoodlink.com/ME2/dirmod.asp?sid=&nm=&type=news&mod=News&mid=9A02E3B96F2A415ABC72CB5F516B4C10&tier=3&nid=5CFFC194A577432DA2A6768839908865>).

1.3. Challenges and concerns

A review of recent literature (Wolff and Scannell, 2008; FAO, 2009; IIED, 2009; WTO, 2010) demonstrates convergence on the following issues, related to private standards, as the source of concern among some parties:

- Stringency of food safety requirements as compared with Codex Alimentarius standards.
- Prescriptive rather than outcome focussed.
- Costs of certification/ Requirement for multiple certifications.
- Transparency/Involvement of key stakeholders in decision-making.
- Legitimacy of private standards and their potential to undermine public food safety regulatory system.
- Impact on access to markets and public health.

A number of intergovernmental bodies (including FAO/WHO, CAC, OIE, WTO,⁴ UNIDO, UNCTAD, OECD, and the UN Human Rights Council) have raised concerns about the impacts of private standards, especially in developing countries. Private standards may be more demanding in stringency and scope than government regulations, and may not be science-based. There is concern that rules established by the private sector, rather than formal livestock policies made by governments and international bodies, may assume greater importance in the future and undermine the authority of intergovernmental standard-setting bodies. Some governments express the view that the rise of private food safety/quality standards is a trend that could supplant or weaken the authority of intergovernmental standard-setting bodies and the multilateral trading system. A 2009 study prepared for the FAO/WHO concludes that private food safety standards raise “profound questions” about the role of national and international public institutions in a world where private sector governance is playing a much greater role (Henson and Humphrey, 2009).

⁴ Private standards has been discussed at WTO’s Sanitary and Phytosanitary Measures (SPS) Committee, the Technical Barriers to Trade (TBT) Committee, and Committee on Trade & Environment (CTE).

About two-thirds of the 40 replies to the WTO questionnaire indicate that at least some of the requirements of private standards exceed those of the relevant international standards (WTO, 2009b). Some respondents of the WTO questionnaire highlight the excessive costs due to requirements for microbiological analysis and also refer to requirements for absence of *Listeria* spp. in some raw meat products (WTO, 2009a). Also respondents to a survey on private standards circulated by the World Organization for Animal Health (OIE) mentioned requirements for *Listeria* spp. for cooked poultry products (OIE, 2010).

Private standards regarding livestock and animal food trade were found to relate to public health, animal welfare, food quality or labour standards. Many of these dimensions do not have an impact on animal health and food safety and cannot be considered as sanitary measures (WTO, 2007).

Many organisations create and adopt standards, and there is a dynamic interchange between the public and private sectors. A challenge for both public and private standards is harmonisation, a guiding WTO principle (see article 3 of the SPS Agreement). Members should also take reasonable measures to ensure that non-governmental bodies accept and comply with Annex 3 to the TBT Agreement (the Code of Good Practice for the Preparation, Adoption and Application of Standards). Evidence suggests that the harmonisation of national food safety regulations around international standards has been slow. Private food safety standards undermine this process of harmonisation, introducing a new layer of governance that further fragments national markets according to the food safety requirements with which exporters must comply. Most responses to the WTO questionnaire identify the multiplicity of private standards and the lack of harmonization among them, and the high costs of compliance, which are additional to what would be incurred to comply with official standards, as major difficulties. The proliferation of private standards was also of significant concern to many members of the Codex Alimentarius Commission (CAC), and compliance with and certification to these standards is difficult, especially for developing countries (FAO/WHO, 2009). However, private standards organisations have themselves driven processes of harmonisation, and equivalence, through benchmarking schemes, for instance, the Global Food Safety Initiative (GFSI).

In 2010, the OIE addressed the national chief veterinary officers and relevant organizations having an official agreement with the OIE with a questionnaire on private standards. Most of the 76 respondents (82 percent) agree with the general statement that private standards for sanitary safety either have created or may create significant trade problems for exports from their countries. The problems most commonly identified are ‘compliance costs’, ‘lack of basis in science or risk assessment’, ‘lack of transparency’, ‘over-prescriptive nature of private standards’ and ‘inadequate consultation with relevant stakeholders’.

The increasing role of private standards has heightened concerns about the transparency and inclusiveness of such standard-setting processes, and their ‘legitimacy’, both in general and in comparison to the standards set by international organizations. A key concern in the WTO context is whether the standards are ‘science-based’ and developed in an open, democratic, inclusive and transparent form, and their potential implications as trade barriers (WTO, 2009b; FAO/WHO, 2009). Generally, private standards tend to be elaborated by technical committees consisting of member companies, in processes that tend to be largely closed, with little or no scope for input from stakeholders unless specifically invited, with little direct ‘voice’ for consumers or the interests of developing countries (Henson and Humphrey, 2009).

Country replies to the WTO questionnaire highlight concerns about the lack of transparency and lack of stakeholders' involvement in the private standard-setting process.

Compliance with private as with public standards can have profound impacts on the structure of value chains. To the extent that there are economies of scale in compliance, proliferation of standards and compliance are likely to induce processes of consolidation and concentration. They may exacerbate the ongoing structural change in the livestock sector (FAO, 2010). In practice, it is however difficult to separate out the specific impact that private standards might have on agri-food exports from developing countries from a range of other factors. As the whole chain approach to animal disease control indicates, public standards can also be a challenge. Exporters of fresh meat or dairy products must comply with multi-tiered requirements including quality grades and standards, traceability requirements, labels of origin, zoosanitary controls and food safety standards, of both a regulatory and private nature (FAO, 2005).

While private standards are nominally voluntary, there is growing concern that commercial concentration within the food industry leads to a situation where conformance to private standards can determine market access. This has caused consternation among many developing countries that have demanded clarification and sought guidance from the concerned international bodies – FAO/WHO, CAC, OIE and WTO – on the current and expected impact of private standards on developing countries and on the rules that govern the development and implementation of such standards.

A joint UNCTAD/WTO Session on Private Standards points out that the term “voluntary” may be misleading. “Although not legally binding in a regulatory sense, private-sector standards are, *de facto*, increasingly becoming mandatory because of the market power of certain large, globally acting retailers and importers” (UNCTAD/WHO, 2007). The role of giant grocery retailers in the development of private standards is particularly noteworthy. Since 1980, the grocery retail sector has undergone unprecedented globalization and concentration (Liu, 2009). In 2007, the top 100 global food retailers had combined grocery retail sales of US\$1,800,000 million – 35 percent of all grocery retail sales worldwide (ETC Group, 2008). With increased concentration, large retailers have the power to require more exacting standards onto their suppliers, including price and product specifications, as well as standards affecting production methods, processing and transport. With the penetration of supermarket giants in the developing world, retailers are imposing standards not just on exports to developed country markets, but also on producers/suppliers located in developing countries who wish to sell to retail operations within their own country.

The rise of supermarkets in the developing world – including Southern and Eastern Africa – is transforming the food retail sector (Reardon *et al.*, 2008). This trend is propelled by urbanization and the rise of the middle class – although supermarkets are also extending into poor neighbourhoods in cities and town all over the developing world. Large supermarkets typically put in place procurement systems that require exacting private quality and safety standards. Producers must make investments and adopt new practices to meet these requirements, conditions that are “hardest for small producers, who thus risk exclusion from dynamic urban markets increasingly dominated by supermarkets” (Weatherspoon and Reardon, 2003). A joint UNCTAD/WTO (2007) Session on Private Standards concurs: “...the increasing use of voluntary private standards may lead to the exclusion of small producers in developing countries from global supply chains, marginalizing those most in need of benefiting from trade for development”.

The buying power of retail corporations has enormous potential impacts on producers and the structure of agriculture in developing countries. For example, the world's largest grocery retailer, Wal-Mart, announced in 2009 that the company's stores in China will buy from over one million Chinese farmers by 2011 (Wal-Mart, 2009). As supermarkets continue to penetrate new markets in developing countries and as their market share expands, the requirements they impose will become those faced by the majority of farmers seeking to sell to the domestic market (Weatherspoon and Reardon, 2003).

A major concern of developing countries regarding private standards has been their impact on small producers, and on farming systems more generally. A report by the Human Rights Council's Special Rapporteur on the Right to Food finds that "the development of private standards has worked against smallholders". The report recommends: "Re-engage[ment] in public regulation of global food chains by (a) guaranteeing that the standards developed by the private sector do not have unintended negative side effects on the realization of the right to food; (b) considering the potential of, and strengthening, alternative decentralized certifying schemes, such as those qualifying products relative to specific cultural/geographical regions; and (c) engaging more broadly in the development of standards through international cooperation" (UN Human Rights Council, 2009).

The replies to the WTO questionnaire point to a disproportionate effect on smallholders but also opportunities, as some small-scale livestock producers managed to obtain certification by forming associations (WTO, 2009a; WTO, 2009b). Thus, evidence with respect to exclusion of small farmers from export value chains is not conclusive (Henson and Humphrey, 2009).

On the other hand, private standards may also benefit producers by requiring more efficient management, reducing costs, improving market access, enhancing product quality and enable producers to obtain higher prices (Liu, 2009). Compliance with environmental standards may improve the management of natural resources and result in better working and health conditions for farm workers. Consolidation leads to sizeable economies of scale, and the benefits of higher investment levels may result in efficiencies that are beneficial to economies as a whole (OECD, 2006). Henson and Humphrey (2009) observe that some of the debate about private food safety standards is fuelled by misunderstandings of why such standards evolved, and the functions they perform. They note that private food safety standards are often closely aligned with regulatory requirements, and the key function of such standards is to provide assurances to consumers in global agri-food value chains that regulatory requirements have been satisfied. Henson and Humphrey (2009) find that "an increasing number of regulatory authorities in member countries are embracing private food safety standards as a means of achieving higher levels of compliance and/or reducing costs".

Private standards might also be seen as means to increase market opportunities, especially in countries where legal frameworks addressing the agri-food sector are underdeveloped. In some - though yet few - circumstances, compliance with private standards can be a catalyst for upgrading and modernization of developing country food supply chains. This requires changes in production practices and investment in infrastructure and equipment as a pre-condition for implementing the standards. The GlobalGAP livestock standards do contain microbiological criteria for zoonosis monitoring that are significant in terms of good hygiene practice in primary production, and these are in line with OIE standards (OIE, 2009).

The report of the OIE questionnaire showed that among developed country respondents there was a strong belief that private standards and certification can be a useful aid to the implementation of official standards whereas this point of view was less marked among developing country respondents (Table 1). (OIE, 2010)

Table 1. Views of OIE member countries on the role of private standards in facilitating implementation of official standards

OECD classification and number of responses	Private standards and certification can be a useful aid to the implementation of official standards		
	agree	no opinion	disagree
Developed countries (36)	89%	11%	0%
Developing countries (28)	53%	20%	27%

OIE, 2010

A scoping study prepared by FAO's Pro-Poor Livestock Policy Initiative examines the threats and opportunities posed to developing countries by changing standards for livestock commodities, and the need to certify compliance with these standards (Perry and Dijkman, 2010). The study recommends a balanced approach to better capture opportunities for pro-poor development: how can we ensure that standards are designed to protect the public at large, and do not disadvantage competitive and quality-conscious enterprises in developing countries? Which standards are most appropriate for developing country production conditions and which will advance national aspirations for sustainable and inclusive (pro-poor) growth? (Perry and Dijkman, 2010).

2. THE FAO QUESTIONNAIRE ON LIVESTOCK-RELATED PRIVATE STANDARDS

Livestock-related private standards appear to be evolving at a rapid pace. In 2010 FAO circulated a global questionnaire on standards, codes of conduct and guidelines in the livestock sector to obtain a picture of the current situation in the livestock sector that has not been fully addressed by the previously mentioned surveys. The questionnaire was sent to various competent authorities in FAO member countries and organizations, both public and private. 105 respondents answered the questionnaire: they came from 50 countries; based on the International Monetary Fund (IMF)⁵ 2009 classification, 15 (30 percent) from developed countries and 35 (70 percent) from developing countries or countries in transition. Most respondents sent also links and material that has been uploaded in the web-based "FAO Gateway to governance in the livestock sector"⁶.

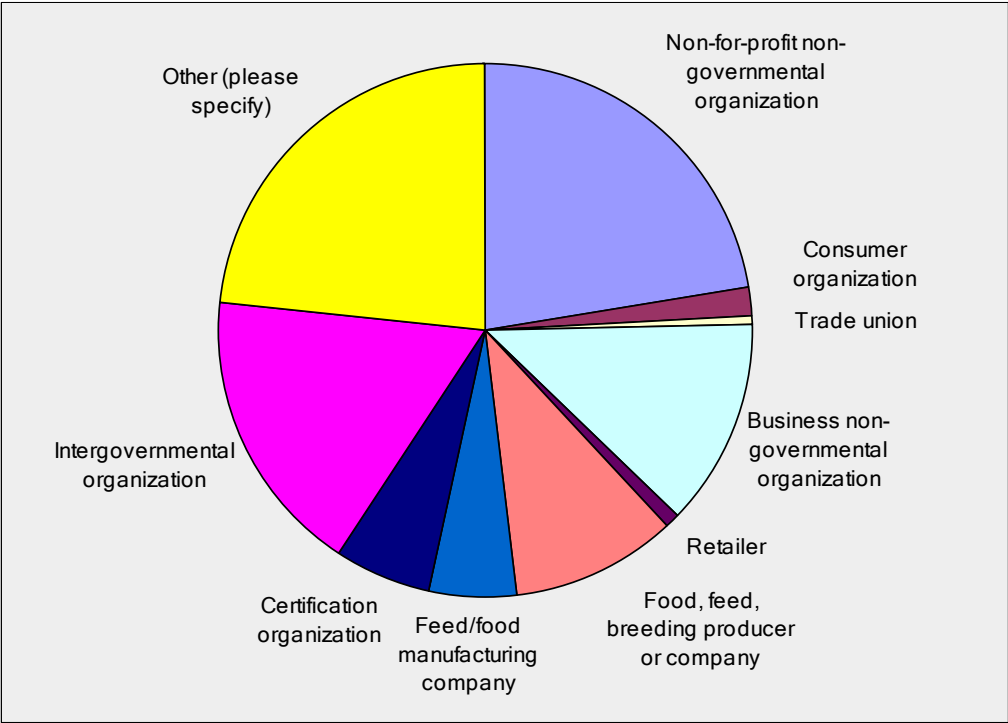
The respondents belonged to highly diversified organizations: intergovernmental organizations, not-for-profit non governmental organization, business non-governmental organization (representing any sub-sector of the food or livestock business),

⁵ There is no established definition for the designation of "developed" and "developing" countries or areas in the United Nations system.

⁶ <http://www.fao.org/ag/governance-livestock.html>.

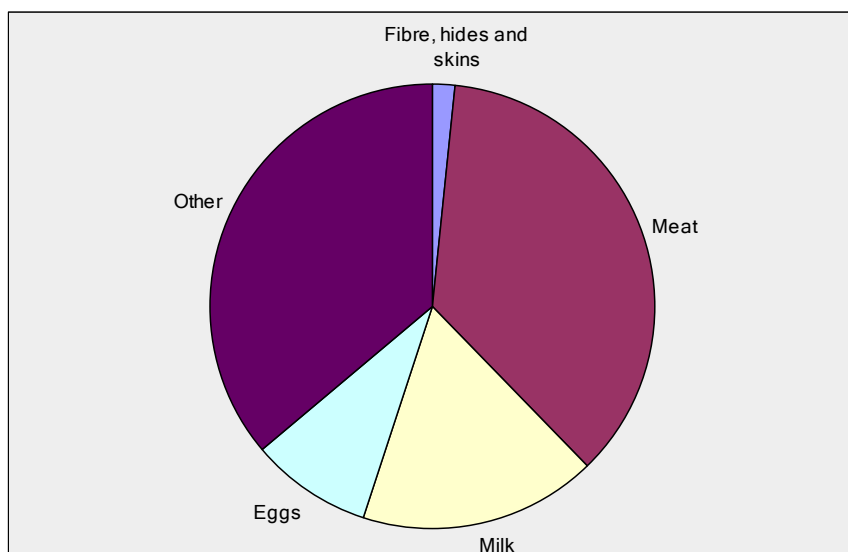
food/feed/livestock breeders/producer or company, trade unions, etc (Figure 1). However, it was noted that most of the respondents who declared to be intergovernmental organizations were in fact governmental, either research organizations or ministries that had been involved in standard development or enforcement.

Figure 1: Respondents' organizations



Most of the respondents (69 percent) belonged both to organizations or companies that have developed standards regarding the livestock sector, at the same time, most of them (70 percent) declared also that their companies or organizations applying some standards. The majority of standards were said to address meat, milk and a range of other products (Figure 2).

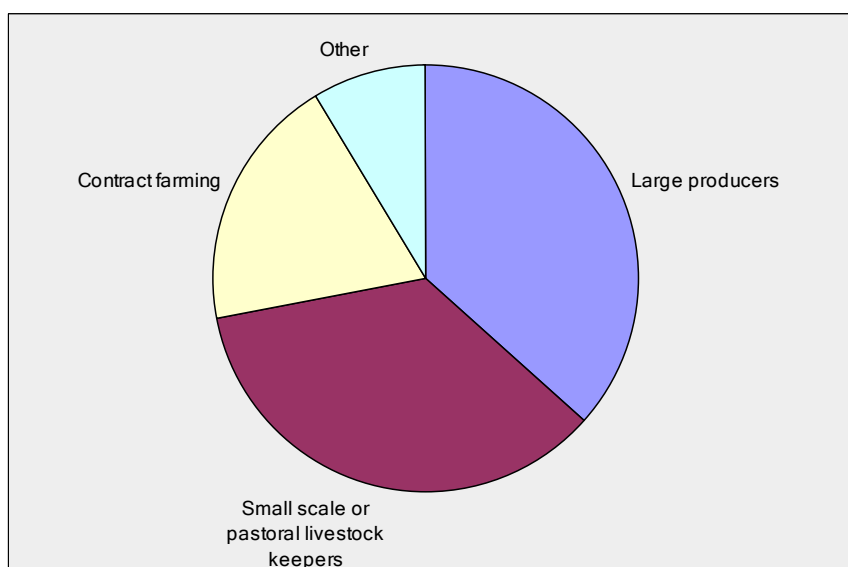
Figure 2: Products on which the standards apply.



56 percent of the standards were said to apply at national and 44 percent at international level, and 16 percent a combination of both. 75 percent of the standards were said are based on other existing national or international regulation or standards (e.g. OIE or Codex Alimentarius.)

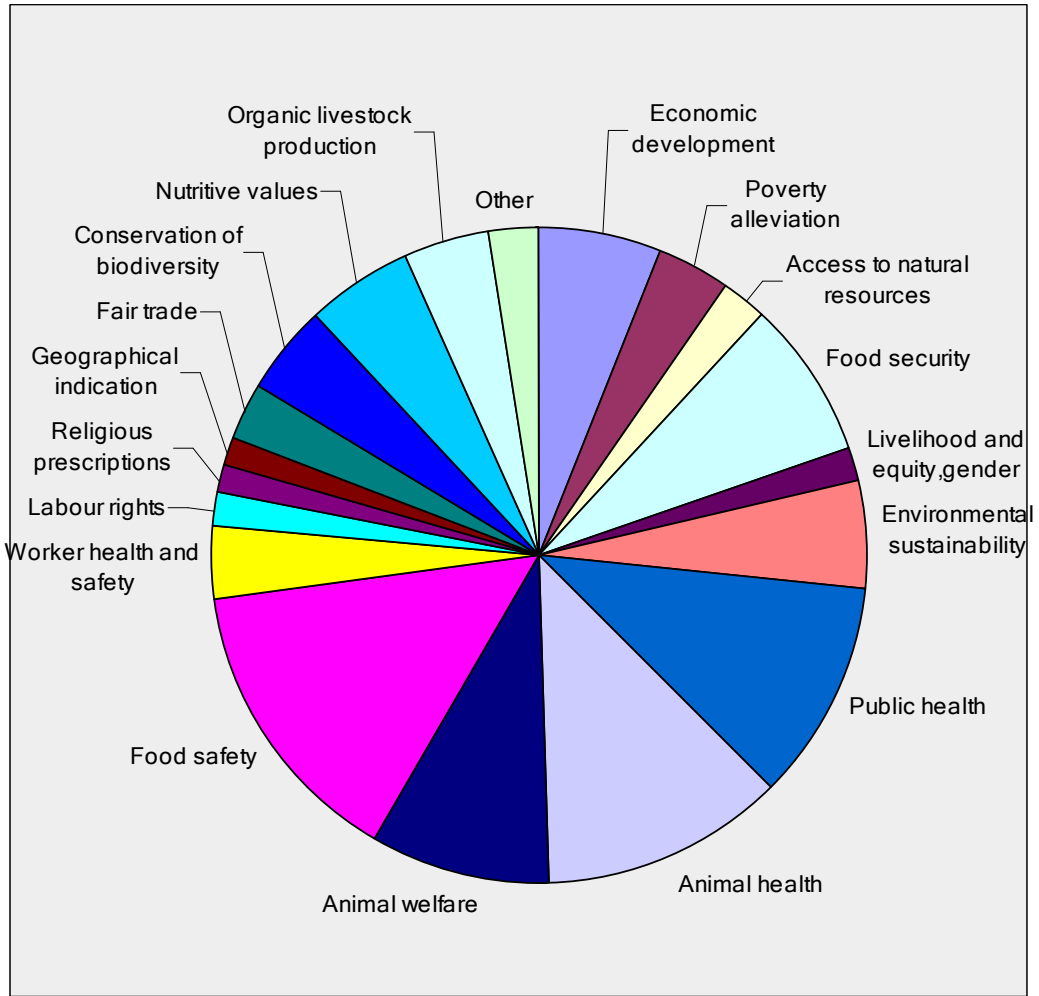
42 percent of the standards were said to address corporate clients (business to business), while 31 addressed the final consumers (27% others). Half of the standards were said to be product based and half process based. Most of the standards were said to address both large producers and small scale or pastoral livestock keepers, while 19 percent to address contract farming (9 percent of the respondents did not answer this question or replied that the standards addressed other groups, e.g. importers, veterinary services. etc.) (Figure 3).

Figure 3: Producers addressed by the standard (more than one answer allowed)



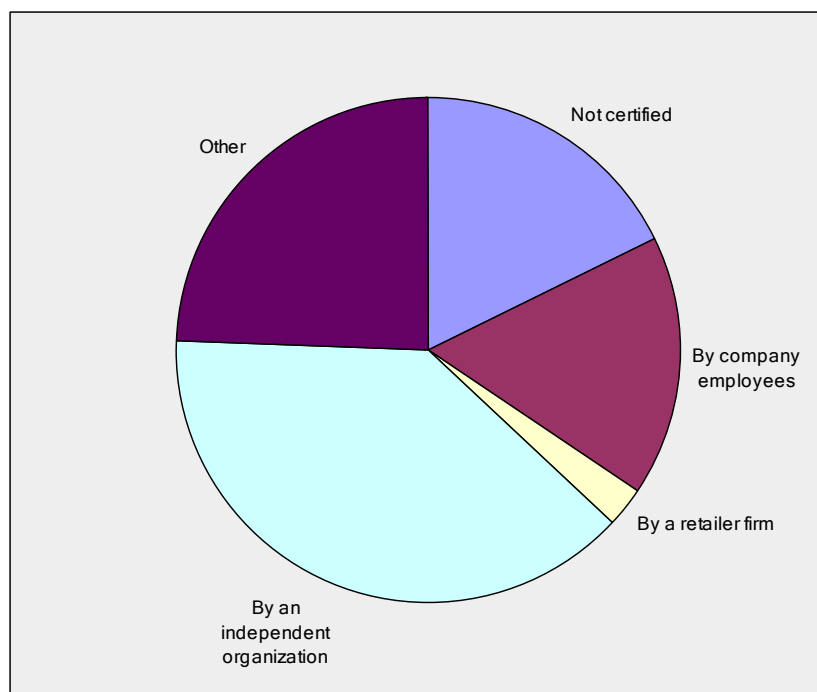
Most of the applied standards were said to have multiple objectives: mostly food safety, followed by animal and public health (Figure 4). However, on the whole, the standards covered a wide range of topics of societal and environmental concerns, such as animal welfare, food security, environmental sustainability, worker health and safety, and nutritive values.

Figure 4: Objectives addressed by the standards (more than one answer allowed)



Compliance with the standards was said to be verified and certified mostly by an independent organization, while only a minority declared that there was no certification (Figure 5).

Figure 5: Verification of compliance with the standard



Most of the respondents answered that the benefits of the standards for producers were multiple, mainly a combination of product differentiation and access to new markets and preservation of current markets (Figure 6). Also the costs associated with the application of the standards were of a multiple nature, and most respondents informed that they were mainly regarding record keeping, auditing and certification (Figure 7). A majority of respondents (64 percent) also informed on existence of training or capacity building activities in place to facilitate the technical application of the standards.

The respondents also informed by a free text answer on what were the main challenges in applying the standards. The answers include:

- costs, especially of inspection and monitoring; the lack of harmonisation between different requirements adding costs to trade;
- market prices too low to balance the expenses;
- lack of real markets for small producers;
- multiplicity of schemes and legislative requirements;
- poor working conditions of livestock workers (problems include: forced labour; child labour; poor health and safety provision; excessive working hours, no formal employment arrangements, affecting particularly temporary, seasonal and migrant workers; discrimination (particularly gender); harassment; low pay; inhibition of freedom of association and the right to collective bargaining);
- geographic and economic isolation often found in farming and in particular in the livestock sector;
- the disempowerment of women and limitations on market access especially in developing countries;
- lack of farmers technical skills; and
- lack of adequate training.

Figure 6: Benefits of applying the standards for the producers (more than one answer allowed).

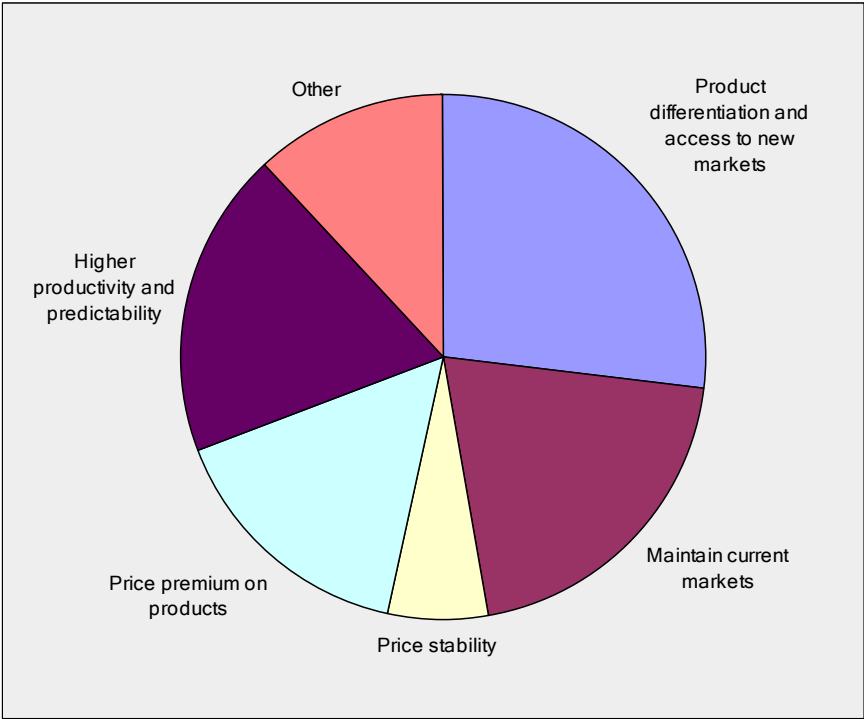
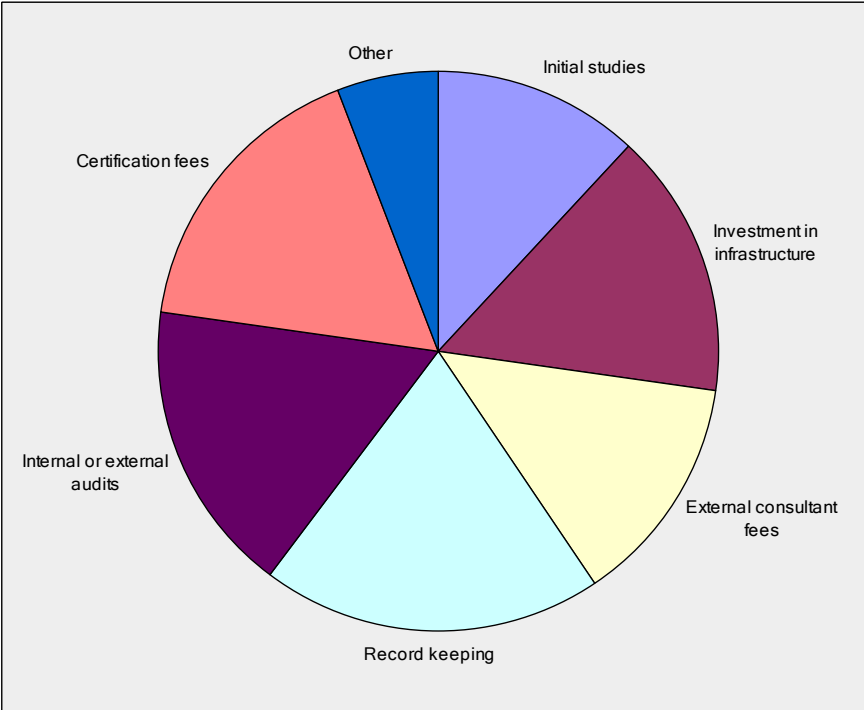


Figure 7: Cost associated with the standards (more than one answer allowed)



The replies to the questionnaire highlight that often a multiplicity of costs could be compensated by an equally broad set of benefits; however, standards implementation should be supported and certain associated costs be offset by ensuring harmonization of different standards and by providing adequate capacity building.

3. CONCLUSIONS

In recent decades private standards have become a key element of governance in global agro-industrial food chains, progressively influencing both domestic business and international trade.

To obtain an overview of private standards addressing the livestock sector, in 2010 FAO circulated a global questionnaire, which was replied by 105 respondents, mostly belonging to governmental organizations, not-for-profit non governmental organization, business organization (representing several sub-sectors of the food or livestock business), and others. In a preliminary analysis, the replies reveal that beyond food safety, animal and public health and animal welfare, a wide range of societal objectives such as food quality, environmental sustainability, poverty and equity issues is targeted in the standards. These objectives go beyond SPS-related measures and seem to confirm that the private standards aim to fill gaps left by international standards and agreements regarding these multiple objectives.

Judging from the range of respondents, the majority of standards seems to be developed by private business, also in cooperation with national government organizations. A more detailed analysis by stakeholder groups still needs to be done. Most standards were said to be based on other existing national or international regulation or standards (e.g. OIE or Codex Alimentarius), thus indicating that the large majority of the standards may possibly exceed, but unlikely be inconsistent with the internationally negotiated ones.

The replies to the questionnaire highlight that often a multiplicity of costs could be compensated by an equally broad set of benefits. Costs related to the standards are about one quarter related to initial investments, with the majority of costs occurring continuously as record keeping or related to certification.

The standards seem to provide economic benefits, not only in premium prices or stabilized or increased market opportunities, but also in productivity increases and more reliable production. This indicates that the implementation of certain standards may be beneficial even without certification. Adherence to the standards is mostly certified by independent organizations.

Despite the relatively high share of capacity building related to standards, the respondents indicated several weaknesses related to technical capacity, social equity and harmonization. Therefore, standards implementation should be supported and certain associated costs offset by ensuring harmonization of different standards and by providing adequate capacity building.

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Annex: FAO Questionnaire on Standards, codes of conduct and guidelines in the livestock sector

Background of the survey

Standards have become a much more prevalent part of the governance of global agri-food value chains in the last 10 to 15 years. Private companies, non governmental organizations and standards-setting institutions, have created and adopted standards, codes of conduct or guidelines for food safety, as well as food quality, animal welfare and environmental, worker safety and social aspects of livestock production. These are increasingly monitored and enforced through third party certification. This has raised profound interest about the market opportunities or barriers they may cause and on the role of public and private institutions in establishing and enforcing norms.

As most available information on standards or codes of conduct regards fruit and vegetables, this questionnaire has been developed to gather information on standards, codes of conduct or guideline impinging on the livestock sector and on products of animal origin (e.g. dairy, meat, eggs; feed) and to help FAO to better target the needs of the sector.

The survey consists of 15 simple questions and will take a maximum of 15 minutes of your time.

Questionnaire: The impact of standards on the livestock sector

1. Which kind of organization you work for?

- Non-for-profit non-governmental organization
- Consumer organization
- Trade union
- Business non-governmental organization (representing any sub-sector of the food or livestock business)
- Retailer
- Food/feed/livestock breeders/producer or company
- Feed/food manufacturing company
- Restaurant chain
- Certification organization
- Intergovernmental organization
- Other (please specify)

2. Has your organization/institution/company developed any kind of standard impinging on the livestock sector?

- Yes
- No

3. Does your organization/institution/company apply any kind of standard impinging on the livestock sector?

- Yes
- No

4. Is the standard applied to a specific product?

- Meat
- Milk
- Eggs
- Fibre, hides, skins

Please add the title of the standard/s and its URL if available online:

5. Which objectives along the value chain is/are this/these a standard/s addressing? (more than one answer allowed)?

- Economic development
- Poverty alleviation
- Access to natural resources (land, water, etc.)
- Food security
- Livelihood and equity, including gender aspects
- Environmental sustainability (e.g. land, water, climate change mitigation)
- Public health
- Animal health
- Animal welfare
- Food safety
- Worker health and safety
- Labour rights
- Religious prescriptions
- Geographical indication
- Fair trade
- Conservation of biodiversity (e.g heritage breeds)
- Nutritive values
- Organic livestock production
- Other (please specify)

6. At which level is the standard applied? (more than one answer allowed)

- National
- International

7. Is/are the standard/s based on any other existing national or international regulation or standards (Codex Alimentarius, OIE) or benchmarking scheme?

- Yes
- No
- If yes, specify

8. Which clients is/are the standard/s addressing?

- Corporate clients (business to business)
- Final consumers
- Other (please specify)

9. Is/are the standard?

- Product based
- Process based

10. Which kind of producers does the standard address? (more than one answer allowed)

- Large producers
- Small-scale or pastoral livestock keepers
- Contract farming

11. What are the benefits of the standard for producers? (more than one answer allowed)

- Product differentiation and access to new markets
- Maintain current markets
- Price stability
- Price premium on products
- Higher productivity and predictability
- Other (please specify)

12. How is compliance to the standard/s verified?

- By company employees
- By a retailer firm
- By an independent organization
- Other (please specify)

13. What are the costs associated with the standard for producers? (more than one answer allowed)

- Initial studies
- Investment in infrastructure
- External consultant fee for implementation or training
- Record keeping
- Conduct of internal or external audit studies
- Certification fees
- Other (please specify)

14. Is there a training/capacity building scheme associated with the development or application of the standard?

- Yes
- No

15. What are the challenges in applying the standard/s?

Thank you.

