Sustainable Farming and Animal Welfare

the greenfield project

A Supply Chain Analysis

2021 RESEARCH REPORT

Photo Cobb Creek Farm
Since 2017, The Greenfield Project has been conducting research to understand the supply chain that moves animal products from breeder all the way to consumer.

Over the course of ten months, our team took a user-centered design approach to build a deeper understanding of the full agricultural ecosystem in order to identify innovative and evidence-based opportunity areas to improve animal welfare through the lens of supply and demand.

This report documents our process, reveals pain points and motivators for key players in the agricultural ecosystem, and bridges the gap between research insights and future opportunities. We invite you to participate as we move our research into actionable next steps.
Research inquiries & objectives

Our research was guided by four key questions to help us meet our goals and objectives as well as build deeper empathy with the entire animal agriculture ecosystem.

01 What are the biggest barriers to producing, distributing, selling, buying, and consuming higher welfare meat, dairy, and eggs?

02 Where within the animal agriculture ecosystem are the most scalable opportunities for improving animal welfare?

03 What are the factors motivating the decisions and behaviors of each stakeholder in the animal agriculture ecosystem?

04 How can we develop solutions for our stakeholders’ unmet needs that generate systemic improvements in the lives of agricultural animals?
The current dominance of factory farming fails to support farmers, is abusive to animals, and damages our planet.

“We need to convince consumers to stop thinking of produce and meat as general commodities. People are willing to pay more for good products, 100% — even people conscious of money. If the demand is there, farmers will follow.”

Relay Foods
Building toward new opportunities

During Phase I, we combined field research with market analysis and our in-house policy expertise to generate insights and find opportunity areas with the greatest potential impact. In Phase II, we will seek feedback and undertake collaboration and exploration with advocate partners in order to develop new initiatives.
Leading the way through research

In order to design scalable solutions that create value for all members of the farming and food ecosystem, we connected with small- and mid-sized farms that prioritize animal welfare and environmental stewardship, and spent time with consumers from all walks of life to learn about the pressures and motivations that influence their eating and purchasing decisions.

From these experiences, we aim to develop programs designed to help consumers access better, more sustainable products in ways that address their needs for convenience and reliability.
Greenfield interviewed 43 stakeholders across the supply chain, following animal products from breeder to consumer.

- **10 Months**
- **10 Locations**
- **43 Interviews**
- **40 Themes**
- **04 Insights**

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<tr>
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Mapping the animal agriculture ecosystem
The Farmer

“I think animal welfare and economic productivity are deeply related. If something causes the animal stress, then it causes an economic problem as well.”

Rob Thomas · Cattle breeder
The farmers we met care deeply about two things: preserving their land for their families and producing food that nourishes others.

Higher welfare farming usually involves raising a variety of species and rotating animals and crops throughout the farm in order to maximize productivity and minimize environmental harm and animal suffering. For many of these farmers, keeping animals and using rotational agriculture is about revitalizing the soil on their family farms that have been ruined by years of monoculture crops and the overuse of industrial chemicals.

Farming different animals and crops requires varied and specialized knowledge and many of these farmers have had to spend years using trial and error to produce the best products. Many also feel frustration that they produce high quality food for consumers who claim to want great tasting products, but who instead buy from big corporations due to price or the greater relative effort required to access small farm products.
There's a much higher hassle factor dealing with meat we had to cut and meat whose supply was so limited. We thought it was the right thing to do and our customers wanted it, so we found ways to supply it. Is there room to improve the supply chain of meat, from farms from Wolf Creek? Absolutely. That was our job and we were working towards improvement.

Zach Buckner · Founder, Relay Foods
Retailers know there is a lot of consumer demand for high welfare animal products. This is true even though consumers are deeply confused about the meaning of various claims like “local” or “grass fed,” and are, in fact, sometimes surprised about the taste differential between these products and industrially produced meat. Despite this great interest from consumers, sourcing these products remains a significant hassle for retailers.

For example, customers expect to be able to purchase all potential products, in all potential quantities, from a grocer whenever they want and usually at an unchanging price. For traditional grocery products, if supply runs out, it is immediately replenished. But the supply chain for small scale, higher welfare animal products does not operate that way. Flavor profiles change seasonally, quality is very farm and region dependent, products are not endlessly available in all locations, and the price is significantly higher.

Some of these wrinkles can be worked out by selling frozen meat, but customers are suspicious because they do not see such products as fresh. Consumers are more forgiving of restaurants, where flavor and quality reign supreme, and where other factors such as year-round availability and price consistency, are less pivotal. As with retailers, though, restaurants report that working out the logistics for a reliable supply with small scale farmers remains a challenge.

Bottom line is that restaurants are businesses. The three big costs are goods, rent, and labor. We want to buy the right thing, but it has to make financial sense. This means we may not be able to buy the most sustainable or local. We have to decide what has the biggest impact—for us, flavor is worth the most money.

Joe Raffa
Executive Chef · Jose Andres
The Consumer

“The problem is that there is so much information, so many labels, and so many choices. Eggs always seem to have the most options, so I always worry about being tricked.”

Lizze · Age 34 · New York City
Consumers feel there are so many issues to worry about—animal welfare, the environment, health, workers rights, immigration, and more.

Understanding these issues requires an enormous amount of research, can lead to compassion fatigue, and each has its own labeling scheme. Consumers are overwhelmed, even if they care about the issues and are willing to pay for them. If it is not simplified for them, they will just choose one aspect that they can distinguish and use that as a guide (e.g., only “local,” only “organic,” “non-GMO,” etc). These simplified heuristics can then be exploited by marketers, later exposed as not ideal, and consumers then feel duped and overwhelmed all over again.

We do not have a culture of caring deeply about our food. American life is not designed to give people the time or information to know how to source their food responsibly. But, judging by the market for Whole Foods, expensive coffee, craft beer, and local farmers markets, there is clearly an appetite for spending significant sums on higher quality products, given the opportunity. For consumers, spending in accordance with purported values acts as a signal to themselves and others that they are meeting their own idealistic goals.

“I care a lot, but it’s just too hard. There is this big informational deficit. With so many options, I don’t know what to buy. And it shouldn’t be my job to do so much work to figure it out.”

Randall
Age 33 · Washington DC
The Market

“As much as people love to point their fingers at the farmers, the people have created the farm system we have today. Farmers only did what customers wanted. Change the customer, change the farmer. It’s that easy.”

Joel Salatin · Polyface Farms
The humane product is often idiosyncratic, and therefore harder to produce, process, and market.

Americans are used to factory farmed animal products designed specifically to achieve uniformity. It is difficult to create similarly consistent products while also committing to humane production. A small, humane farmer can spend years implementing different systems that can improve the soil, add to the diversity of the farm’s production, and minimize or even eliminate environmental impact. But then what?

Slaughterhouses often only accept large deliveries of animals prearranged months ahead of time. Even if our small farmer can get their products ready for sale, they do not have a contact at the big grocery chains, and cannot afford to hire the middleman to negotiate a contract to do so. Besides, because their farm is so seasonal, and their scale so small, they cannot consistently produce enough to be the sole supplier to any retailer. So, that leaves them with the farmers market. To do well there, they also have to become a sales and marketing expert—designing labels and signs for their stalls, investing in refrigerated truck(s), spreading the word on social media, hiring extra labor to staff the stalls, and doing the administrative work associated with the farmers market’s regulations.

The existing market structures are not designed to help farmers beyond the production of their humane product. Instead, they are primarily set up to support big market players.
Research process

Synthesis is the act of “making sense” of all the data gathered, then translating insights into opportunity areas that will inform future solutions.

**Write observations**
Analyze research notes, write key data points, and organize them in groups.

**Group by themes**
Extract themes by identifying patterns between observations within a group.

**Draw insights**
Draw insights from the key themes and across each group of observations.

**Define opportunities**
For every insight, there is a corresponding opportunity to inspire a solution.
Research insights

Misinformation is holding back improved farming and improved eating.

- News and advocates convince consumers to care about issues such as animal welfare and sustainability but the market is so noisy that they are easily overwhelmed
- Once consumers are aware they can be easily misled, they feel manipulated and resort back to apathy
- As a result, good farmers get lost in the noise and can’t form trusted brands/relationships with consumers

Consumers have both too much and too little information at the same time.

- Consumers have too much information in the form of competing labels and issues to care about
- They also have too little information on what changes make the biggest differences, how to directly help the people/animals in their sphere of control, and how to spot the fakers
- This paradox leads consumers to feel resentment towards the people they feel should be doing the work (like retailers), and causes them to resort to heuristics to stem feelings of hopelessness

Farmers are faced with too many business facets to do it all well—and blame consumers.

- Farmers feel that consumers should connect more with their food and shop according to their stated values
- On the other hand, consumers feel overloaded with the work they are expected to do and while also paying a higher price, in a market where they have too much information and too little information at the same time

Consumers and farmers need better ways to communicate their needs and challenges to each other.

- There needs to be stronger oversight of fakers and simplified ways for consumers to know how to identify the “good” food
- Advocates and retailers must help make “good” products accessible to consumers by promoting and marketing good farmers, creating clear, streamlined labels or other identifiers, educating the public, and reducing emotional burden on consumers
Opportunity areas

We have identified three key opportunity areas to explore and design solutions to meet the needs of all stakeholders in the animal agriculture ecosystem. These opportunity areas are meant to inspire our next steps collaboratively and drive us closer to improving animal welfare through the lens of supply and demand.

01 Focus on consumer education regarding higher welfare food.
- Consumers are currently conditioned to have meat at every meal, and typically chose what meat products to purchase by price point. Consumers should be educated to change their expectations—to eat less, but better, meat.
- Such changes in consumption behavior should be supported by additionally setting consumer expectations around the consistency, availability, and price of higher quality animal products.

02 Create a major alliance among all animal welfare groups to launch a new, unified labeling campaign.
- Determine the key information consumers need to improve their animal product purchasing, and push for federal regulations or legislation to define pertinent labels and enforcement schemes for misleading labels.
- Consolidate existing labels into a new, consistent scheme, and ensure there are meaningful baseline “floor” requirements for any welfare claims or certifications.
- Create a consolidated consumer outreach program to educate consumers about animal welfare labeling.

03 Invest in farmer education and improved marketing to consumers.
- One major gap that needs to be bridged is that producers of higher welfare animal products are expert farmers, not expert marketers. Animal welfare groups and other stakeholders should conduct regulatory advocacy aimed at getting USDA to provide necessary outreach, research, and other resources for high welfare farmers.
- Animal welfare advocates should also create and consolidate farmer resources that will help their products cut through the “noise” and access consumers.
Next steps

01 Engage stakeholders such as funders, nonprofits, and legislative offices

02 Revisit opportunity areas

03 Launch 2-5 new initiatives

04 Design metrics to measure progress and validate initiatives
We embrace the social, cultural, communal, and emotional significance of food. We value eating in a way that honors the profound influence that these and other factors have on our food choices but that does better for people, animals, and the environment.

We believe that the most promising means of achieving measurable change is through supporting and facilitating improvements within the existing animal agricultural system while also advocating for increased plant-based eating. We do so, by focusing on changing the practices of large agricultural corporations, lending support to responsible farmers, and connecting consumers with the food that meets their values.
Our team

Liz Hallinan
Executive Director & Co-founder

Liz aims to harness the power of legislative, regulatory and business policies to promote sustainable agriculture and improve the lives of farm animals.

Before co-founding Greenfield, Liz worked for a variety of public interest organizations, including the Natural Resources Defense Council, the Animal Legal Defense Fund, and Meyer, Glitzenstein, and Eubanks. She received her undergraduate degree from Harvard University and has a law degree from New York University and a masters in science from Queen’s University.

Lisa Winebarger
Program Director, Policy

Lisa works to identify promising policy-based vehicles for improving industrial agriculture in the United States, with a view toward finding win-win solutions that benefit animals, consumers, farmers, and the environment.

Prior to joining Greenfield, Lisa worked for several public interest organizations, including the Alliance for Children’s Rights, the Humane Society of the United States, and Compassion Over Killing. She received her undergraduate degree from the University of British Columbia and her law degree from the American University Washington College of Law.

Ashley Carr
Co-founder & Board Member

Ashley co-founded The Greenfield Project with Liz, and currently serves on its Board of Directors.

Ashley is a senior associate at DLA Piper LLP, where she specializes in life sciences litigation. She has a strong background in legal and policy analysis and a deep interest in increasing the market share of sustainable agricultural products through consumer-facing initiatives. She received her undergraduate degree from Rice University and her law degree from Harvard Law School.
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