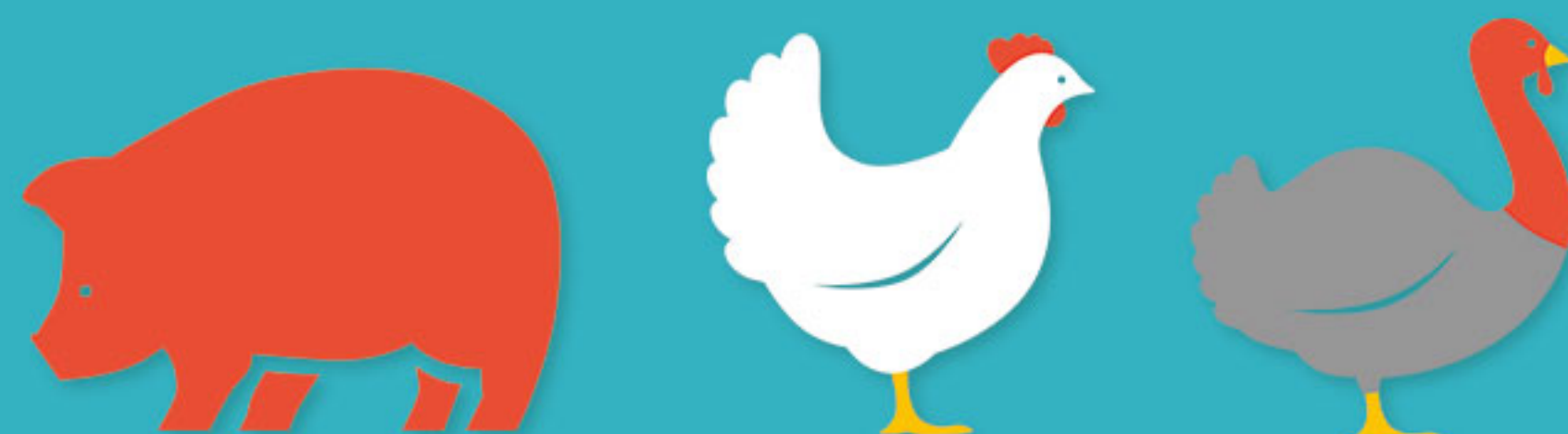
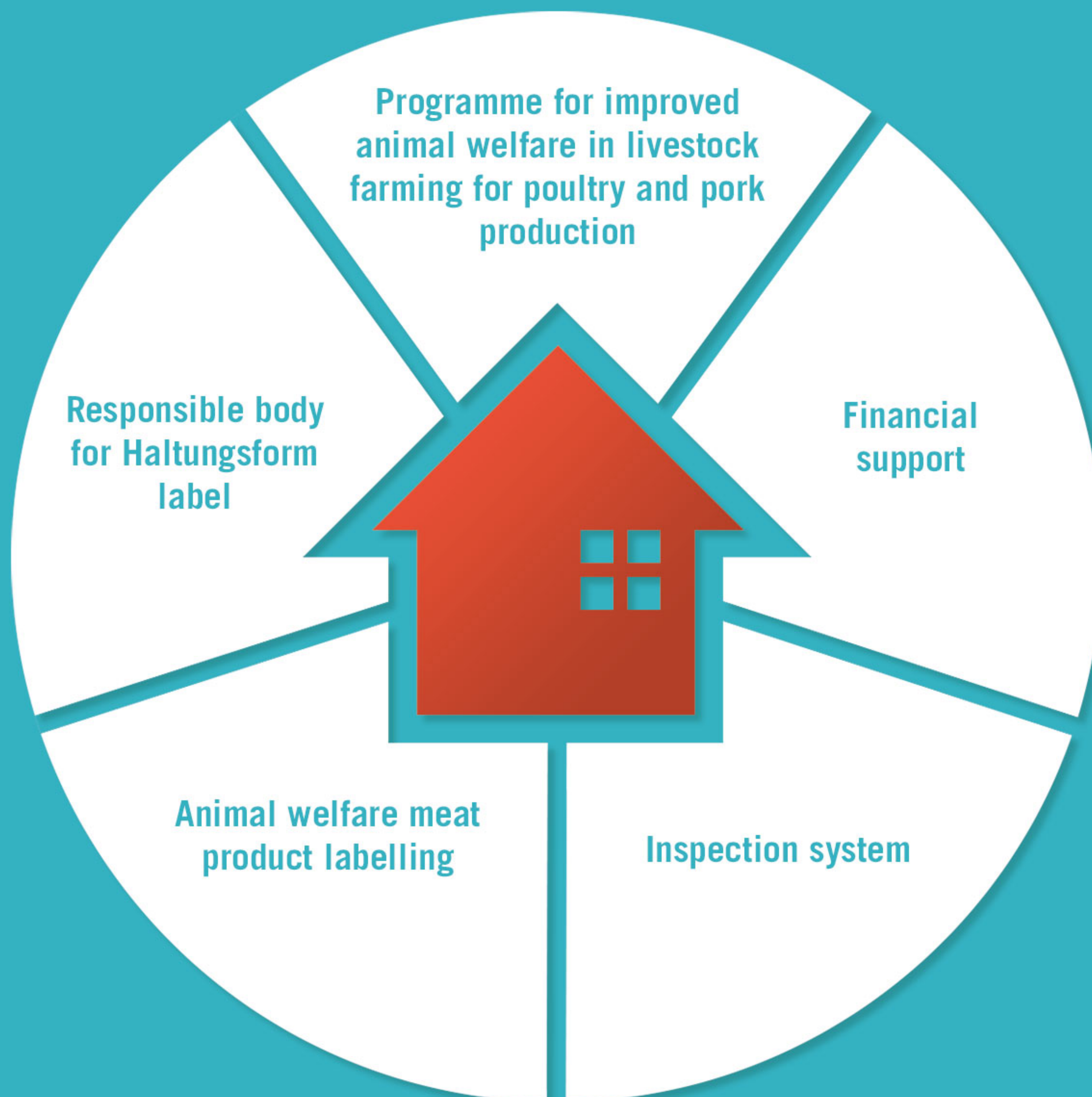


ITW today: 6 years, 2 programme phases

August 2021

Initiative Tierwohl (ITW) is a cross-sector industry initiative for animal welfare. Together farmers, the meat industry, and Germany's leading food retailers have initiated an evolutionary process to enable animal welfare improvements on a broad scale.

As of Spring 2021, the ITW is focused on the following areas:



1. Milestones

2013

Sector agreement signed in Berlin

2014

Operating company established

2015

Initiative launched

- First payments received from food retailers
- First farms registered to participate

2017

Inspection system expanded with two inspections per farm per annum

2018

Second programme phase started

- Animal welfare criteria updated
- Poultry label introduced
- First pork label used
- Animal welfare criteria standardised and enhanced

2019

ITW remit expanded

- First innovation prize awarded (overall funding volume of 3 million euros)
- Consulting service introduced for pig farms based on the animal health index
- Haltungsform label launched

2020

Preparation for third programme phase and further expansion

- Successful registration phase for third programme phase
- Second animal welfare innovation prize awarded during pandemic
- Haltungsform label updated and expanded
- Online learning platform for poultry launched
- Criteria re-standardised and level of animal welfare raised through the introduction of a new "roughage" criterion for pigs
- First catering company – dean&david – signed up to the ITW
- First online retailer – HelloFresh – signed up to the ITW

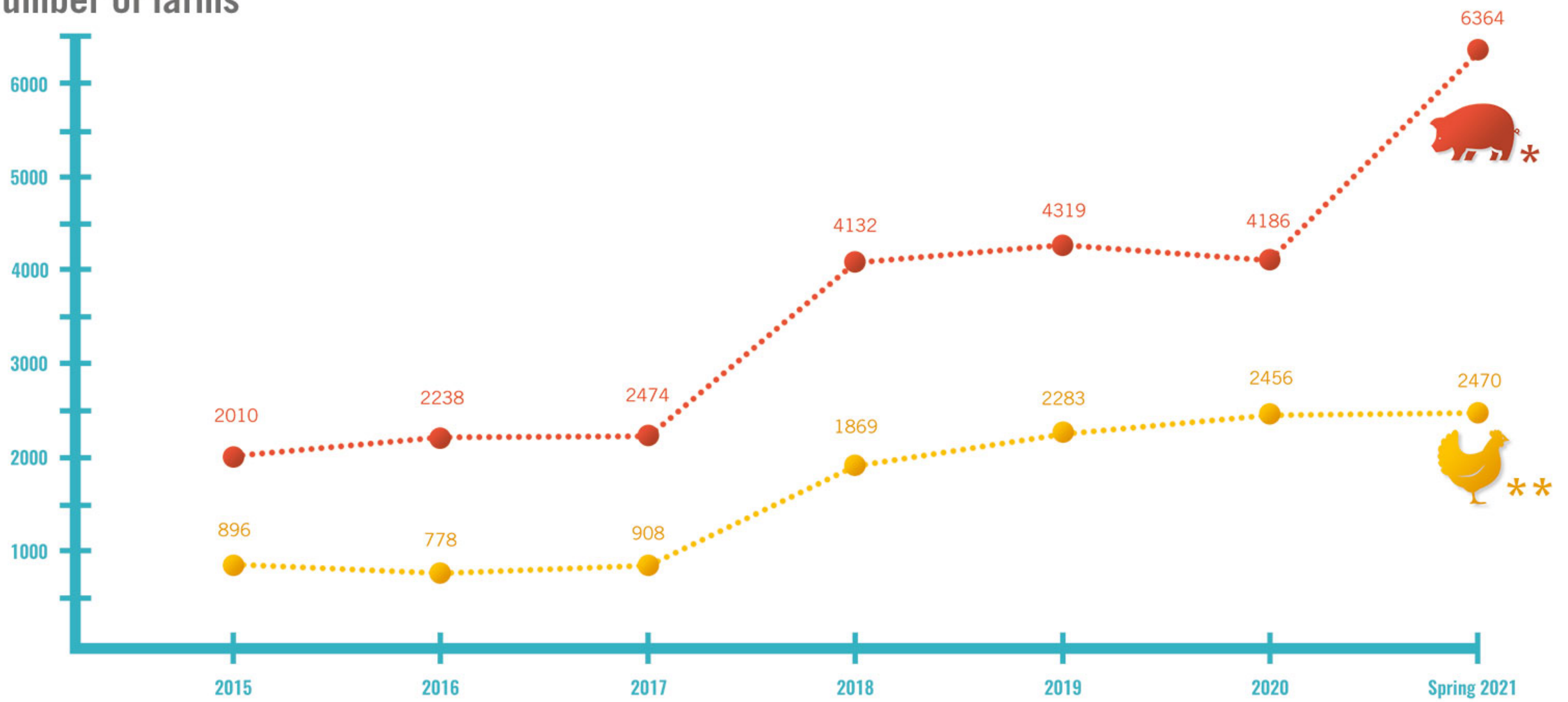
2021
onwards

Third programme phase

- Expansion of participants from agriculture
- Comprehensive labelling for ITW poultry and pork
- Expansion of labelling on processed products
- Implementation of new financing models:
piglet fund, pig market solution, poultry market solution

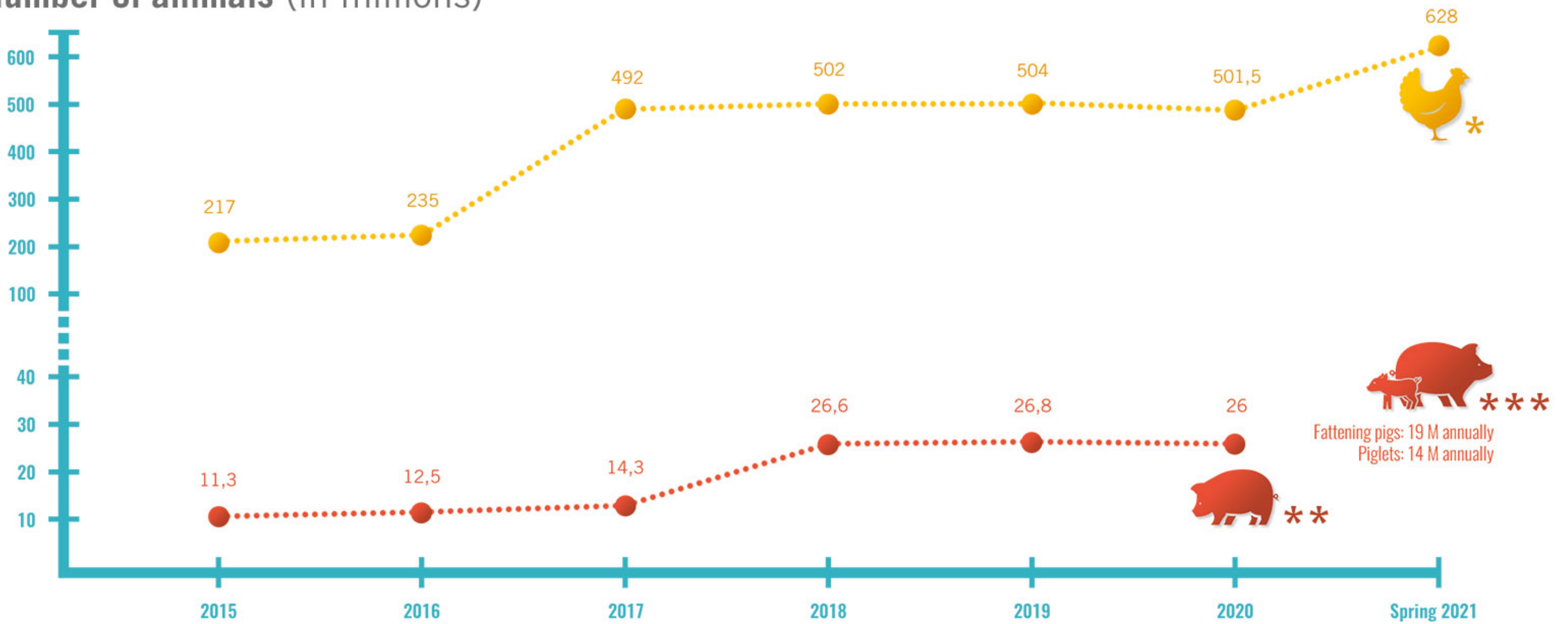
2. Programme for greater animal welfare

Number of farms



*Sow farming, piglet rearing and pig production **Broiler and turkey farming

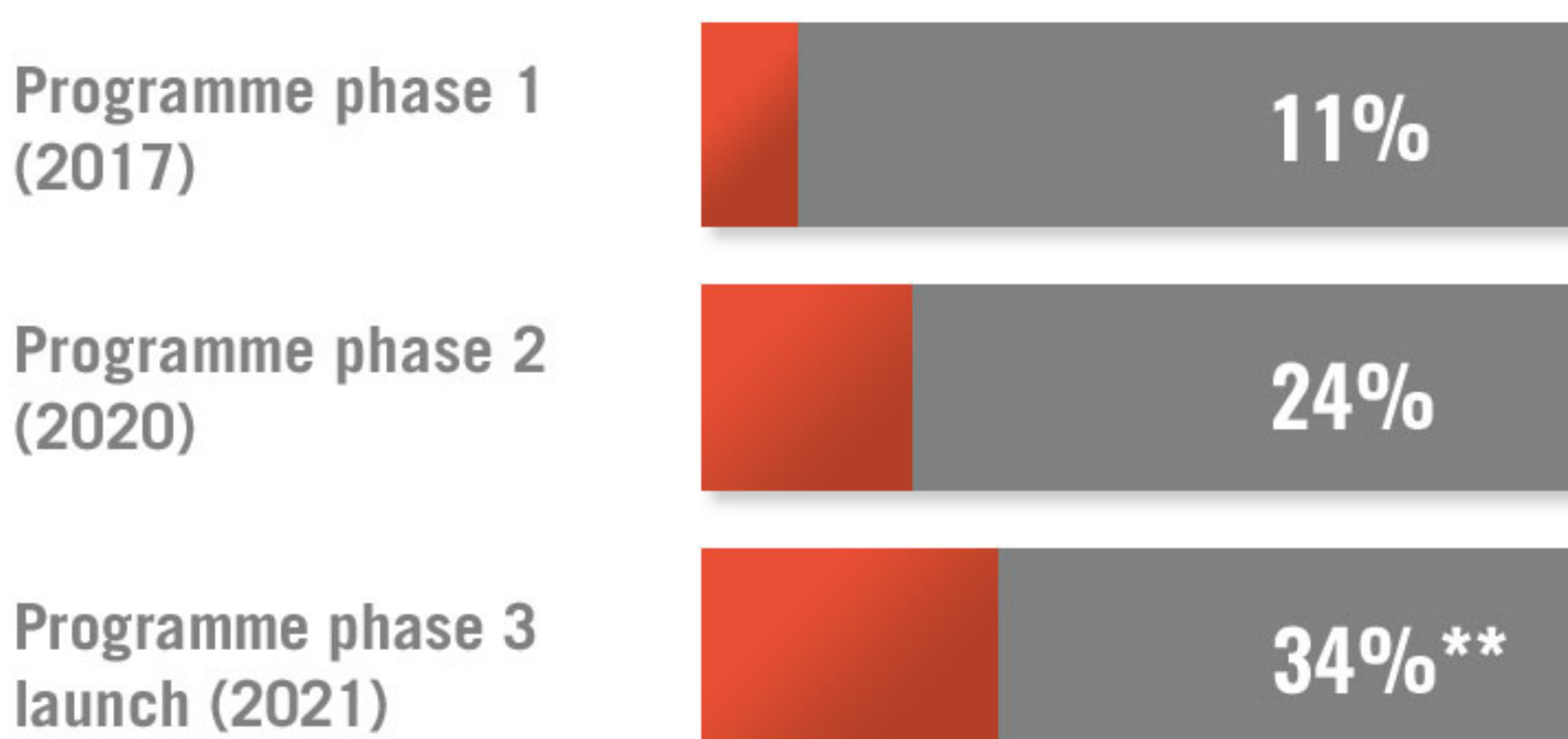
Number of animals (in millions)



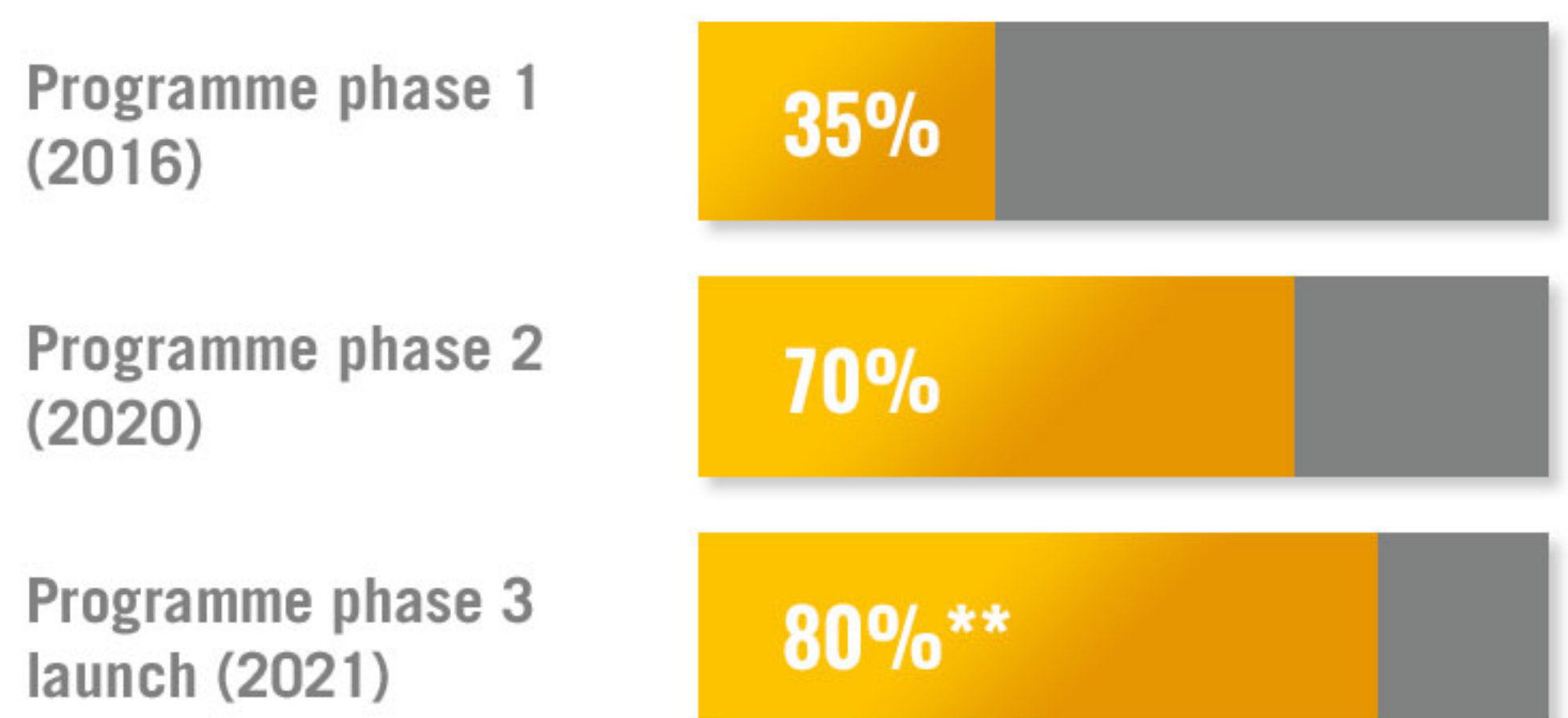
Fattening pigs: 19 M annually
Piglets: 14 M annually

*Number of animals in broiler and turkey farming each year **Number of pigs in sow farming, piglet rearing and production each year
***The ITW 2021-2023 programme incorporates two financing models for pigs, which differ in their counting method: fund-financed piglet production (sow farming and piglet rearing) and market-financed pig production.

Market shares* pig



Market shares* poultry (broilers and turkeys)



*Concentration of ITW production pigs among pigs produced in Germany
**Reported, not yet audited

*Concentration of ITW poultry among poultry slaughtered in Germany each year
**Reported, not yet audited

3. Financial support

Support from food retailers during the first two programme phases

Programme phase 2015 - 2017

255 Millions €

Programme phase 2018 - 2020

390 Millions €

645 Millions €



Bünting
UNTERNEHMENSGRUPPE



Netto
Marken-Discount



Innovation support



The animal welfare innovation prize has been awarded twice

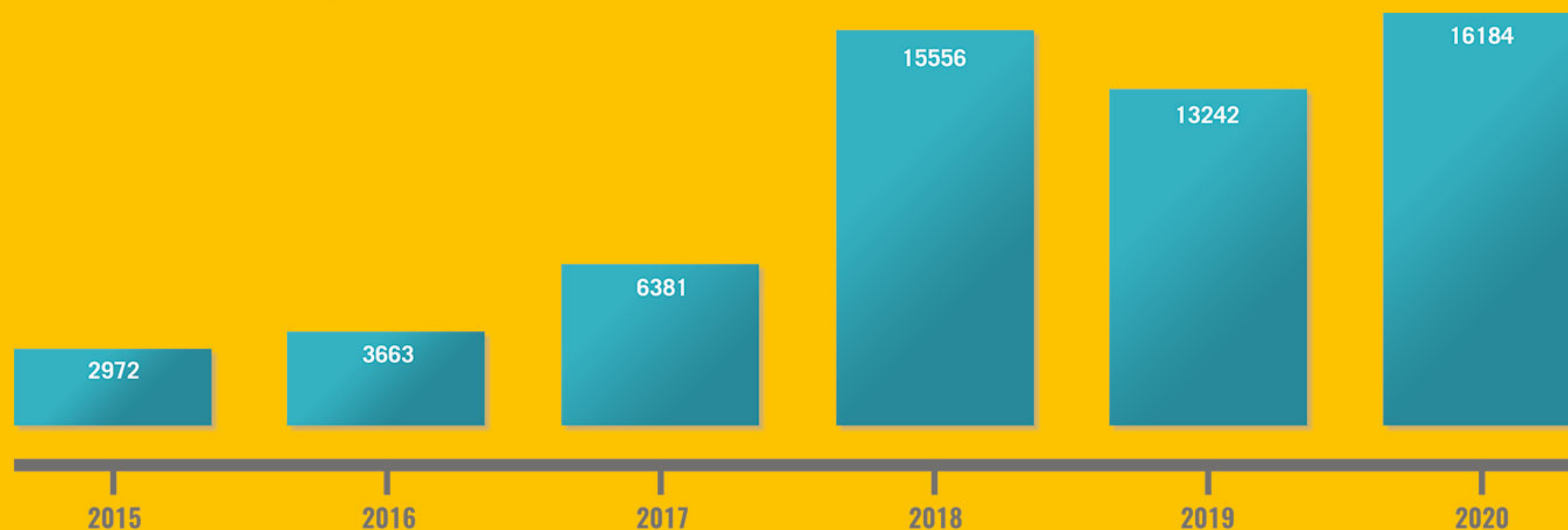


Seven farmers have been granted awards and received a total of 47,000 euros in prize money



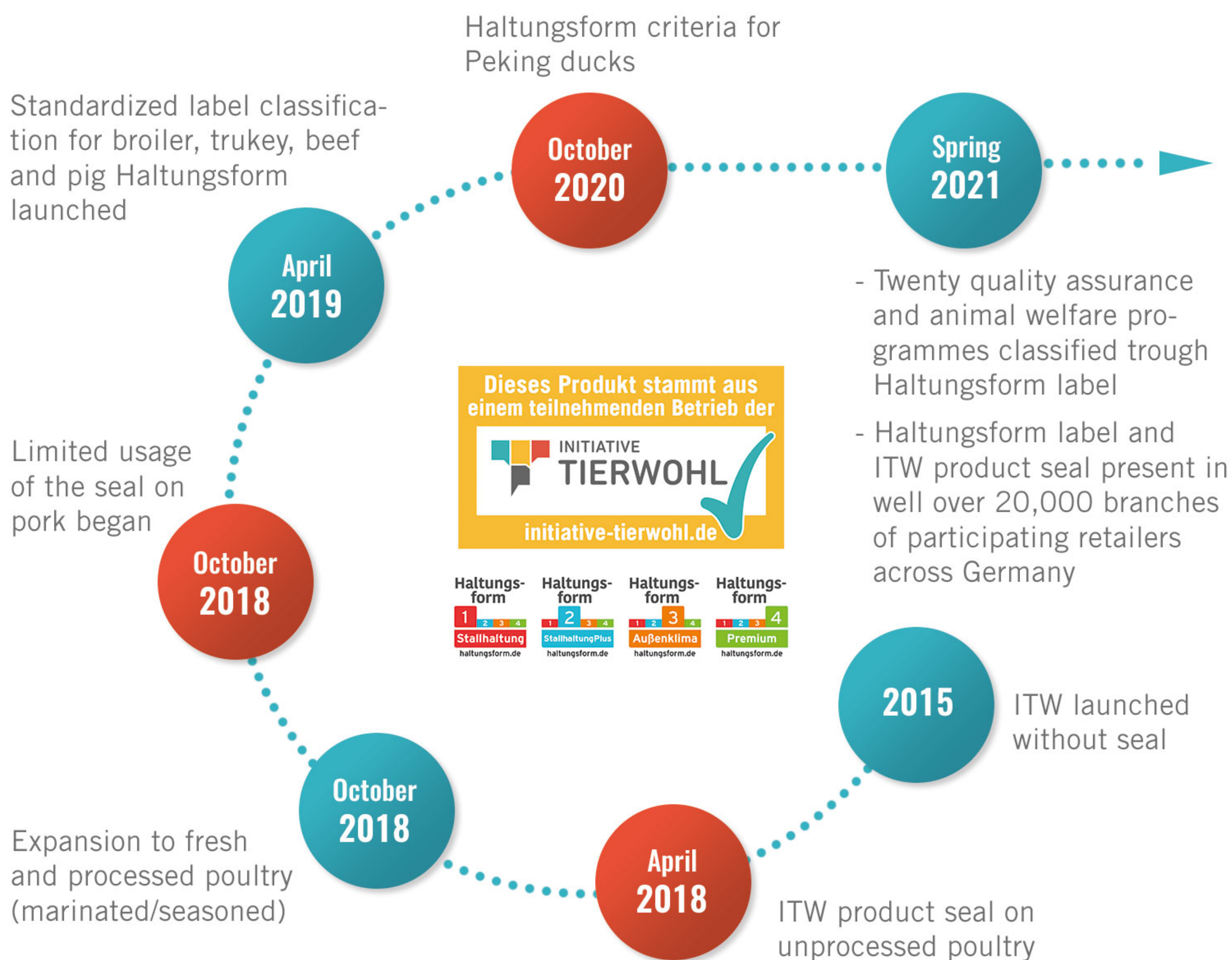
Six scientific animal welfare improvement projects were granted a total of 900,372 euros

4. Inspection programme



Number of examinations per year

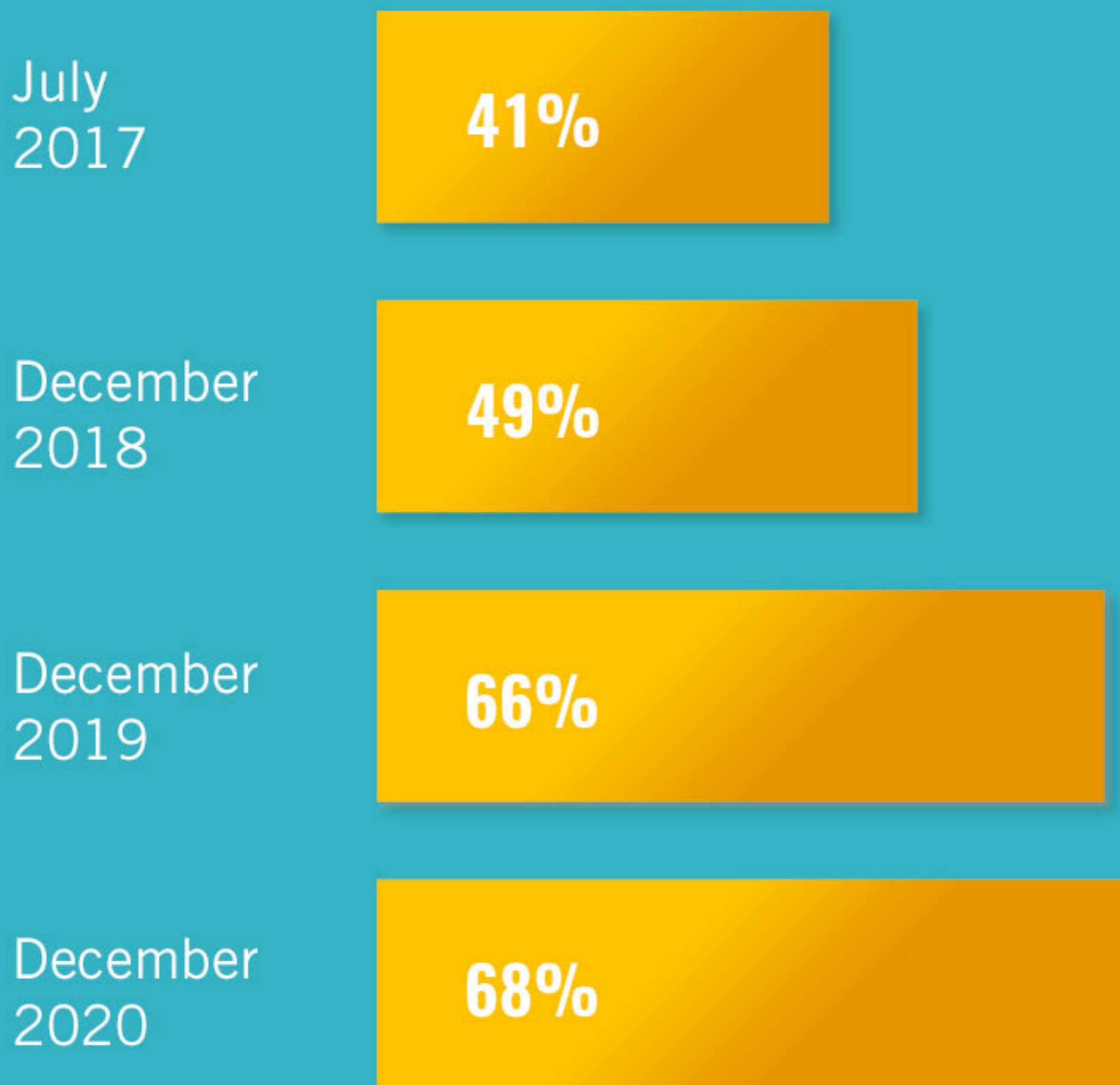
5. Meat product labelling



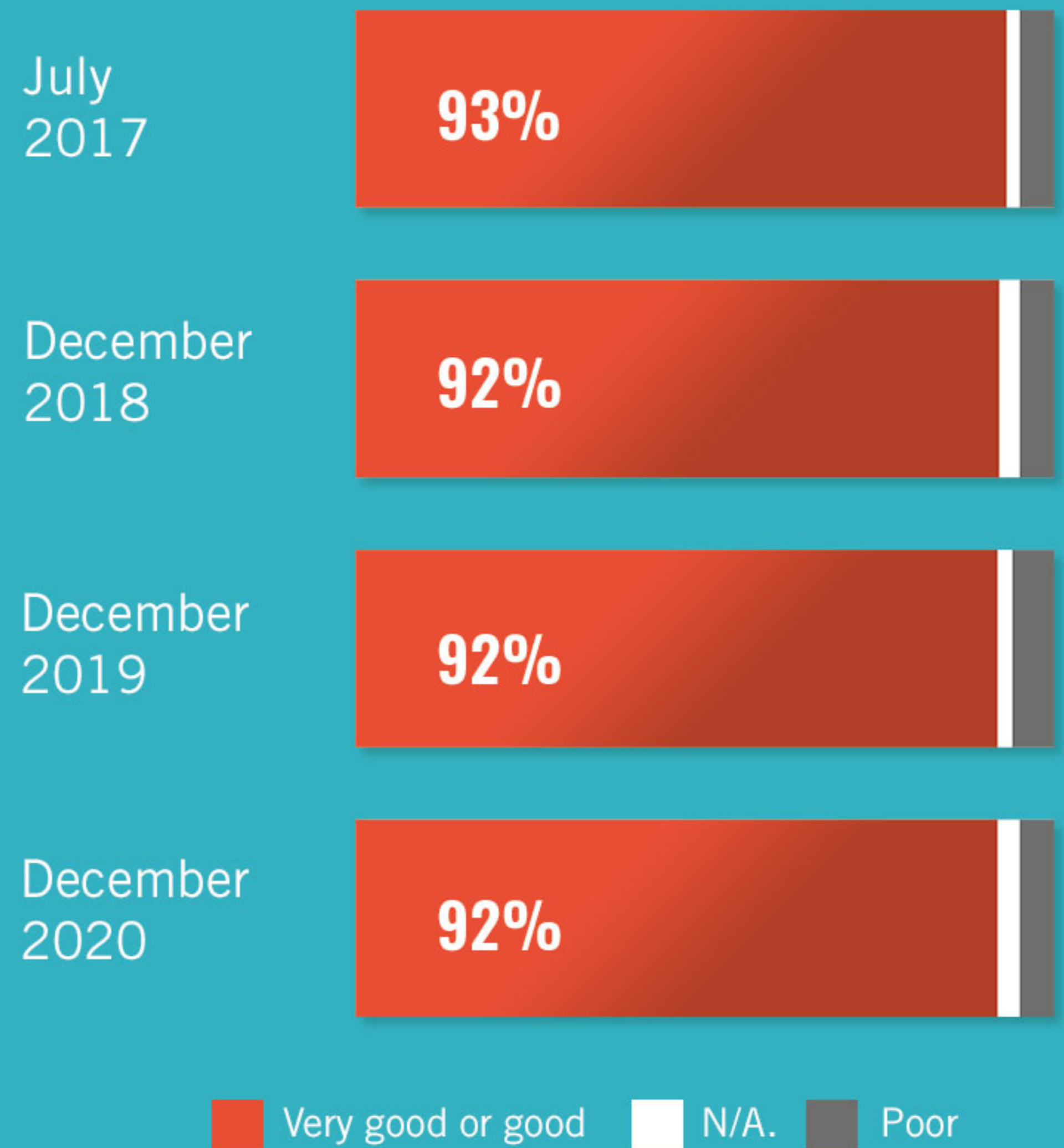
6. Consumer acceptance*

*Source: forsa, Dec. 2020

Number of people who have heard of or read about the Initiative Tierwohl:



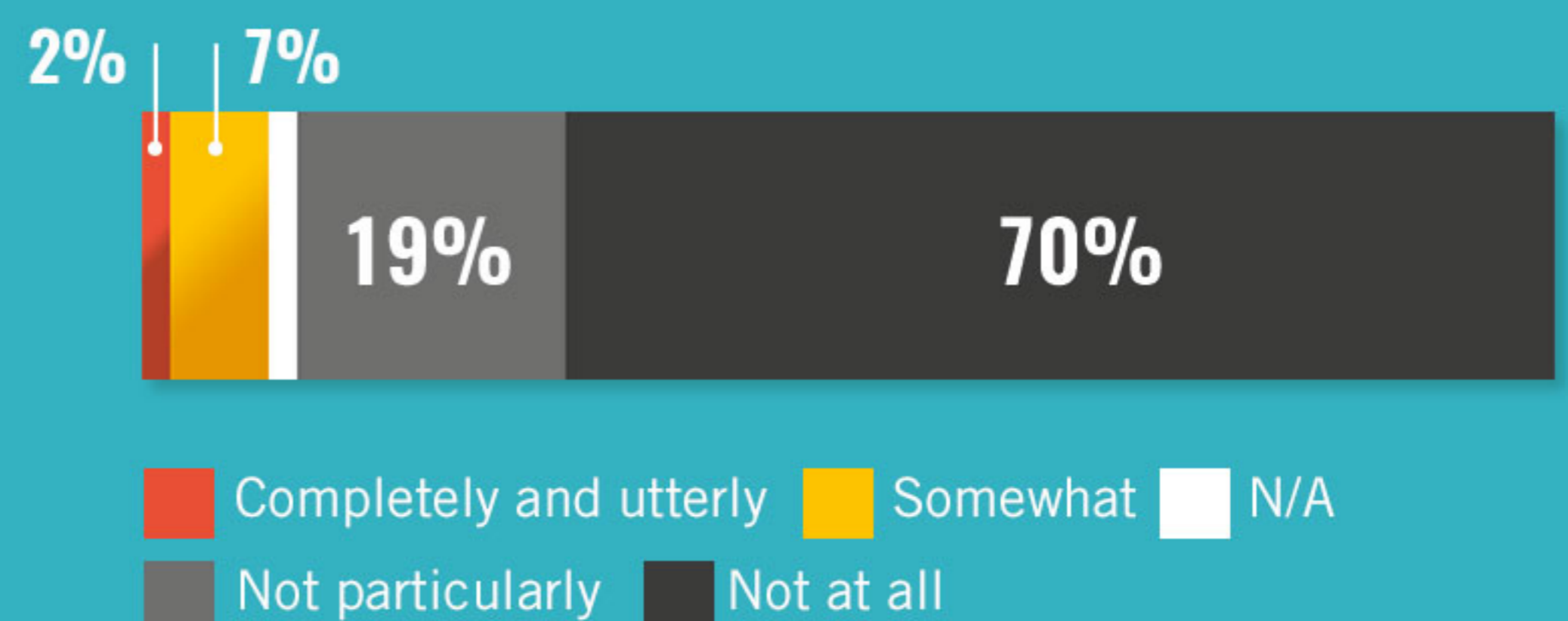
Consumer opinion on the Initiative Tierwohl concept:



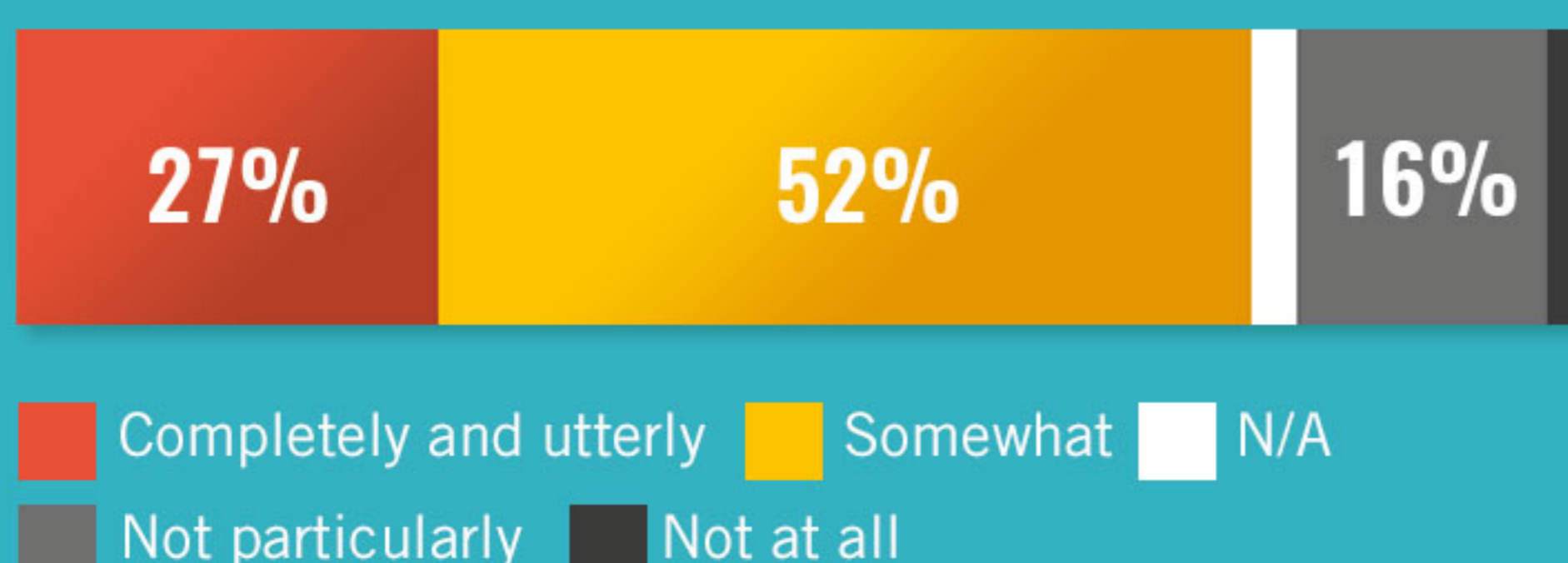
Consumer opinion on four-tier Haltungsform labelling in food retail:



I find food labelling about livestock farming methods unnecessary:



In the long term, Haltungsform labelling will lead to consumers being able to shop more consciously and take the issue of animal welfare into greater consideration when deciding what to buy:



Have you ever consciously noticed the Haltungsform or ITW product seal while shopping?

