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Report

Financing the transition to cage-free farming in the EU



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EXECUTIVE SUMMARY

Public momentum to phase out cages in EU farming has intensified, following the 2021 European Citizens' Initiative "End the Cage Age" and the Commission's ongoing revision of animal-welfare legislation, now expected by late 2026. This report examines: (i) the **costs** of transitioning to cage-free systems for laying hens, pigs, rabbits and calves; (ii) **financing mechanisms** available at EU and national levels; and (iii) **policy levers** and contextual factors shaping progress in Germany, France, Spain and Poland.

The study builds on a literature review, an EU- and national-level policy instrument mapping (with emphasis on Common Agricultural Policy (CAP) Strategic Plans 2023–2027 and the Commission's 2028–2034 CAP proposals), and targeted country analyses (Germany, France, Spain, Poland) supported by stakeholder interviews.

Core findings from the evidence review

Across species, Member States and policy contexts, the findings point to a consistent overall picture:

- The transition is **technically feasible** but involves varying levels of **investment, management changes and land or building adaptations**.
- **Structural investments dominate transition costs**, while operational effects differ by species.
- **Productivity typically rebounds after an initial learning period**, reinforcing the importance of phased timelines.
- The **maturity of alternatives differs substantially across sectors**, influencing feasibility (rabbits/does) and costs (pigs/sows in particular).
- **Existing EU and national instruments** are important but **insufficiently targeted** to make cage-free transitions happen at scale.

Key learnings from the Member State analyses

The Member State cases provide concrete examples of the factors shaping transitions in practice. Across all four countries, a consistent set of structural barriers and enablers emerge: uncertainty about forthcoming EU legislation, limited targeted funding for major housing investments, insufficient demand-side incentives, and a CAP framework that largely rewards maintenance rather than transformation. At the same time, they show that legislative certainty, targeted finance, mature technical alternatives and strong market signals can unlock progress.

Table 1: Key learnings from the Member States analyses

Sector	Key learnings
Calves	
France	- The adoption of collective housing practices for calves results mainly from a bottom-up approach and is spread easily among farmers. - The potential for supporting collective housing in calf farming remains underutilised at national level. However, the phasing out of individual pens for calves should not lead to serious adverse effects on production costs or investment burden. - Most of the labels for meat production do not require the collective housing of calves. - Several projects and working groups are currently working on the development of collective housing for calves.
Poland	- There is currently no national legislation or national funding instruments to promote collective housing for calves. - The CAP strategic Plan might contribute indirectly to developing collective housing through an investment scheme, although it remains uncertain how many such operations have been supported. - There is no labelling scheme taking into account the housing conditions of calves.
Pigs	
Spain	- Support is granted by two Autonomous Communities through the CAP Strategic Plan for free-farrowing practices. - A stable regulatory framework is needed for farmers, notably on the minimum space requirement for sows, as upfront investments needed can be significant. - Due to lower farrowing rates, there is a risk of lower productivity during the transition period, when converting to free-farrowing practices. - Private labels related to animal welfare do not require or promote free-farrowing practices.
Germany	- Newly adopted legislation will restrict the confinement of sows to a maximum of 5 days. This restriction will be fully implemented at the end of the transition period, running until 2035. - Farmers consider that public subsidies are insufficient to face the high investment costs, notably because it relies on annual budget decisions and lack long-term planning. - Without appropriate financial support, many sow farmers would consider exiting production instead of converting to free farrowing practices. - Current meat labels do not reflect the sow housing conditions.
Laying hens	
Germany	- A national ban on all cages for laying hens was adopted in 2015 in Germany, and cages are now prohibited. - The industry's commitment to exclude caged eggs, triggered by several NGO campaigns, facilitated the adoption of a legal ban. - The provision of financial support for farmers to transition away from cage-farming was instrumental in the transition. In total, EUR 260 million were invested in new housing systems to build 9 million places for laying hens.
Poland	- Despite being the EU's 5th largest producer of eggs, most of the laying hens (67%) are still reared in cages. - Financial support towards cage-free farming is possible through the CAP Strategic Plan of Poland, but it remains uncertain what share of the budget contributes to it.

Sector	Key learnings
	• Commitments from the private sector to end the commercialisation of caged eggs create supply chain pressure for cage-free production.
Rabbits	
France	• Despite rabbit meat production still relying heavily on the use of cages, the sector is keen on implementing alternative practices in order to improve the visibility of rabbit products and reverse the current production trend. • A switch in production methods could also meet the demand for organic rabbit products, which is currently higher than the supply. • The costs associated with a transition in production methods at national level could be comprised between EUR 112 million and EUR 132 million, with a significant share dedicated to upfront investments.
Spain	• Besides the existence of a few organic farms, the immense majority of rabbits in Spain are reared in cages. • Further research and data are needed to develop alternatives to the use of cages for rabbit farming and to estimate the associated costs. • Certain labels and certificates related to animal welfare apply to rabbits and take into account the housing conditions of rabbits, but they do not require the adoption of cage-free practices.

Cross-cutting findings & recommendations

Drawing on the full evidence base, including sectoral research, MS analyses, and the policy instrument review, the following cross-cutting conclusions and recommendations can be formulated:

1. Policy certainty is a key enabler for the cage-free transition

Legislative certainty with clear transition deadlines is the primary driver of investment readiness. Without clearly defined objectives and timelines, farmers lack clarity about future requirements, discouraging them from adopting alternative rearing practices. The Member State analyses carried out within the context of this study confirm this conclusion, where statutory endpoints and phased timelines exist (e.g. Germany), they have facilitated investment; where they are absent (e.g., Spain for pigs), incremental adjustments tend to stabilise existing systems. Transition periods help farmers adapt and manage short-term disruption. **The ongoing revision of EU legislation on animal welfare represents a critical milestone for enabling a coherent transition to cage-free systems.** At present, uncertainty about the final content and timelines of the forthcoming reforms makes many farmers hesitant to invest in housing systems that could soon become obsolete.

- **The swift adoption of a revised EU animal welfare legislation** is crucial to provide the visibility producers need to plan and commit to long-term investments without risking technological or regulatory obsolescence.

- The **legislation should set out clear species-specific transition periods and be accompanied by implementation guidance based on the latest scientific and technical advice** from the European Food Safety Authority and the EU's Reference Centres for Animal Welfare, so that producers can make informed investment decisions as early as possible.

2. The transition towards cage-free systems differs substantially across species

Transition costs and pathways towards cage-free systems vary considerably across species and production contexts. While some common elements can be identified, the evidence clearly shows that there is not 'one transition'; transition challenges, financing needs, legislative requirements, animal health considerations and demand-side dynamics differ considerably between sectors.

Especially **costs and performance can vary significantly by species**: conversion in the laying-hen sector typically requires structural investment and can lead to higher running costs. However, learning effects (better design, flock management, hygiene) narrow performance gaps over time. For pigs, the literature indicates that well-designed temporary or zero-confinement farrowing systems can achieve performance comparable to continuous crating after a learning curve, with estimated cost increases of roughly 2–4% depending on design and management. By contrast, for calves, although structural investments may be needed for remodelling of facilities, the operational costs of collective housing tend to be similar to those of individual pens. For rabbits, alternatives, especially those for breeding does, often require further technical optimisation before they can be deployed at scale.

Importantly, evidence suggests that **the quality of system design, hygiene, biosecurity and staff skills influences outcomes** far more than the simple distinction between cage-free and caged systems, pointing to the **importance of training and knowledge exchange** to help farmers design and manage cage-free systems effectively from the start.

- **Financial support schemes should be grounded in evidence-based impact assessments** that take into account species-specific transition costs, farm characteristics and the maturity of available alternatives.
- **Assessments should consider both structural investment needs and operational changes**, as well as expected learning effects and supply-chain responses that may influence long-term costs.
- **Member States should establish species-specific transition plans, including financing and training.** Plans should be aligned with EU

timelines, including clear milestones, financing instruments and advisory capacity. They should combine investment aid for structural conversion, advisory services and training, and knowledge-exchange platforms under their **Agricultural Knowledge and Innovation Systems** (AKIS).

- **Species-specific “conversion packages”** integrating pre-investment design support, technical standards and staff training can help farmers implement cage-free systems effectively from the outset and reduce transition risks.

3. Upfront investments remain a key constraint

High upfront investment costs remain one of the main barriers to the transition towards cage-free systems. While productivity impacts during the transition period are often temporary, farmers must finance substantial structural changes to housing and farm infrastructure. Across species and countries, **access to capital for conversion, including buildings, retrofits and land reconfiguration, remains the binding constraint**. As a result, although it is very difficult to assess the full cost of transitioning, the adoption of targeted funding instruments for investments represents a key enabler of the transition. **Public support therefore needs to focus more strongly on facilitating capital investment and improving access to finance.**

- **Member States should combine CAP funding, State aid and financial instruments to support structural investments.** Blending grants with loans and guarantees can help farmers finance major housing conversions and reduce upfront capital constraints.
- **The EU should provide clearer guidance on transitional support under State aid rules.** Clarification would help Member States design schemes that support structural investments and temporary income foregone during the transition while remaining compliant with EU competition rules.
- **Member States should prioritise animal welfare investments when implementing the EIB’s agriculture and bioeconomy facility,** a dedicated EU instrument designed to mobilise large-scale investment in the agriculture sector. When negotiating agreements with financial intermediaries, Member States should ensure that financing instruments supported by the EIB explicitly enable investments in cage-free housing and other animal welfare improvements.

4. Public financing through the Common Agricultural Policy (CAP) could better target the phasing out of cage farming

Only a **small share of current CAP schemes directly supports phasing out cages**, as **many measures reward practices already in place**. While the proposed 2028–2034 CAP introduces **transition payments and extensification support** that could accelerate the shift towards more resilient, high-welfare systems, the removal of ring-fenced budget for environmental and animal-welfare spending poses a risk for the attractiveness of such schemes. Progress will remain slow without clear prioritisation in National Strategic Plans and strong Commission guidance. Ensuring that Member States make full use of transition payments, investment support and advisory services to improve housing conditions is essential for achieving meaningful welfare outcomes.

- **National Regional Partnership Plans should explicitly prioritise the transition to cage-free systems.** Especially Member States with high livestock densities or strong competitive advantages in specific sectors should be required to demonstrate how NRPPs will facilitate housing transformation, including through **transition payments and extensification support, investment aid, and advisory services**.
- **The Commission should issue clear guidance to safeguard animal-welfare ambition in NRPPs**, encouraging Member States to allocate sufficient resources to structural investments and transition measures despite the removal of environmental ring-fencing. In this perspective, the **Commission should also use the approval process** to ensure that the transition towards cage-free farming is clearly embedded and adequately resourced.
- **Member States and the EU should strengthen the role of the CAP in scaling up organic livestock farming.** The adoption of EU-level livestock-specific organic targets, for instance through the definition of a minimum share of animals reared under organic standards, would send a clear market signal and help align national strategies. Embedding these targets into NRPPs would accelerate the uptake of production systems that inherently meet higher animal-welfare requirements, including cage-free housing.

5. Demand side measures are underused but important for sharing costs along the value chain

Growing demand for higher-welfare products is essential to sustain the transition to cage-free systems. Although cage-free practices may raise production costs,

strong demand-side measures can help maintain price competitiveness and support producers. Retail commitments, public procurement and credible, harmonised labelling enable cost pass-through and create stable demand; their absence limits incentives for producers to convert.

- **Consumer information should be improved** through clear, harmonised EU-wide animal-welfare labelling, enabling consumers to identify cage-free and higher-welfare options across both primary and processed products.
- The **EU should promote organic production and consumption as a driver of market demand for cage-free products**, embedding organic uptake targets and supporting their integration into public procurement, marketing and consumer information policies.
- **The EU should strengthen trade policy to prevent unfair competition for cage-free products from low-welfare imports**, ensuring that products entering the EU market meet equivalent standards or are subject to appropriate safeguards.

In conclusion, as the EU prepares its forthcoming animal-welfare reforms, the evidence is clear: the transition to cage-free systems is achievable, but will require legislative certainty, targeted and well-designed financial support, and strong demand-side measures. Without aligning these elements and without species-specific planning, the EU risks a slow and inconsistent transition. With them, the move away from cages can deliver lasting improvements in animal welfare while supporting viable and resilient farming systems.

1. INTRODUCTION

In 2021, in response to the **European Citizens' Initiative "End the Cage Age"**¹, which gathered over 1.4 million signatures the European Commission committed to phasing out and prohibiting cage systems for laying hens, rabbits, pullets, broiler breeders, layer breeders, quail, ducks and geese, sows (farrowing crates and sow stalls, where not already prohibited); and calves (individual pens, where not already prohibited) (European Commission, 2021).

A revision of the existing animal welfare legislation was proposed for 2023, and the Commission pointed to several existing and planned measures to support a transition to cage-free systems. These included: eco-schemes and other interventions Member States could offer in their Strategic Plans implementing the Common Agricultural Policy (CAP) for the period 2023 - 2027, a revision of public procurement criteria, a potential EU-wide animal welfare label, voluntary commitments by retailers and food processors, targeted research, innovation, and training activities, extending the scope of agricultural marketing standards, and potential alignment, such as import requirements associated with the EU Trade policy (ibid).

However, progress has been slower than anticipated. **The Commission's Vision for Agriculture and Food reaffirmed the phase-out of cages** and announced species-specific transition periods and pathways (European Commission, 2025a). While the inception impact assessment was carried out in 2021, which indicated that the legislative proposal was planned for 2023², the actual impact assessment only began in September 2025³. **Legislative proposals are now expected by late 2026**, following a timeline parallel to the development of the Multiannual Financial Framework (MFF) and the CAP for the period 2028 – 2034.

1.1 Cage-free vs. cage-based systems in the EU

The use of cages does not affect all farmed animals in the same way, due to the diversity of housing methods and the specificity of each species. For instance, the use of crates for the gestation and farrowing period for sows leads to a restriction of the movement of sows and increases stress and frustration (Humane Society International/UK, 2024). Likewise, despite the prohibition of conventional cages,

¹ https://citizens-initiative.europa.eu/initiatives/details/2018/000004_en

² https://food.ec.europa.eu/document/download/f9fcb5fd-0495-47c0-aba9-4b3630a61b52_en?filename=aw_eval_revision_iaa_food-labelling.pdf

³ https://food.ec.europa.eu/animals/animal-welfare/evaluations-and-impact-assessment/revision-eu-animal-welfare-legislation_en

the use of enriched cages for laying hens remains common and impairs the natural behaviour of laying hens (EFSA, 2023b). By contrast, the use of cages for rabbits reduces some health risks associated with rabbit production. However, the use of the different types of cages also affects the welfare of animals, as for instance, in single-litter cages, female does cannot sufficiently express natural behaviours such as running and jumping (Van Damme et al, 2023). Similarly, the rearing of calves in individual pens also leads to adverse welfare consequences, which are notably due to the isolation and the lack of contact with the dam or other calves, resulting in higher levels of fear and stress (EFSA, 2023d).

For each of these species, several alternatives to confinement in cages exist. First, for laying hens, alternative husbandry systems include barn systems, aviaries, and systems that provide outdoor access. The uptake of these alternatives is increasing and represents a noticeable share of the production in Europe, although the share of laying hens reared in enriched cages remains significant; in 2019, 49.5% of laying hens were still raised in cages in the EU (Kollenda et al, 2020). For calves, there is an increasing trend at European level of housing calves younger than eight weeks in groups⁴ (EFSA 2023d). The data on housing methods in calf rearing are rather scarce, but several surveys conducted in Member States suggest that most calves are housed individually at one point (Klein-Jobstl et al., 2015/ Stanek et al., 2014). The use of alternative systems for sows, such as free-farrowing practices, also only represents a small share of the production, as currently between 86 and 95% of sows are still confined in farrowing crates during the lactation period (Malak-Rawlikowska et al, 2024). Finally, only a fraction of the rabbit production in the EU is using alternative housing practices; for instance, for fattening rabbits, barren cages made up roughly 85% and enriched cages around 9% of production in 2017 (European Commission, 2017). Existing alternatives, such as floor or elevated pens, account for the rest of the production, while systems with outdoor access are scarcely used according to an interview with a research institute. For female does, the use of alternatives to cages remains limited, notably since the welfare benefits of cage-free systems are still debated (EFSA, 2020).

In the absence of progress at EU level, Member States such as Austria, Germany, and Belgium⁵ maintain **national bans or phase-out plans for selected species**,

⁴ As per [Council Directive 2008/119/EC](#), calves shall be housed collectively after the age of eight weeks.

⁵ The use of conventional cages for laying hens in Austria has been prohibited since 2009, while enriched cages have been completely banned since 2020. Germany prohibited the use of conventional cages for laying hens as of 2009, while “group-cages” are now prohibited, with certain

creating uneven progress across the EU (Urios et al, 2022). There has also been a **marked increase in voluntary corporate commitments**, with retail and food processors accelerating change (CIWF, 2024). For instance, according to the “eggtrack” database⁶, several companies across the EU have already advanced towards cage-free status. For example, Carrefour has pledged to sell only cage-free shell eggs under its own brand across Europe by 2025⁷, while several businesses supported the call for an EU-wide ban on cages (CIWF, 2024). **Public opinion remains strongly supportive**: over 80% of EU citizens believe that farmed animals should be better protected, and 81% want CAP subsidies to promote animal welfare (European Commission, 2024), underlining that farmed animals deserve to live a full life, allowing them to express their natural behaviour. Beyond welfare, debates around **food security and protein diversification** have intensified against the background of the COVID crisis, the invasion of Ukraine and an increased frequency of climate change effects, such as extreme weather events and ecosystem collapse, all affecting food production in Europe.

Against this background, the transition to cage-free systems is increasingly framed not only as an animal welfare improvement but as part of a necessary broader sustainability shift in European food systems. **Moving away from intensive caged production can help address structural challenges such as high dependence on imported feed proteins, land-use pressures, and greenhouse gas emissions** (van Vugt & Nadeu, 2025). Furthermore, cage-free farming can create synergies between animal welfare, antimicrobial resistance reduction, and sustainable production systems, especially when combined with organic conversion and lower stocking densities (Allen et al, 2020).

However, while a robust EU-level legislative framework with clear transition targets and timelines will be an important driver of the shift to cage-free farming, **the pace of transition will be shaped by multiple interacting factors**. Economic factors, particularly the cost of conversion and access to funding, are likely to be decisive for the speed of progress towards phasing out cage-based farming in the EU. While the CAP is repeatedly highlighted by the Commission as a central instrument to support the transition, **CAP funding alone is unlikely to be sufficient to cover the scale, speed, and distributional impacts of an EU-wide shift to cage-free systems**. Investment needs are uneven across species

exceptions granted until 2028. In Belgium, existing cage systems for laying hens will be prohibited after 2028 in Wallonia, which will be the end of a 10 year transition period, after the law was adopted in 2018; Flanders adopted a regulation on the use of all cages system 2024, which sets a final prohibition date of these systems in 2036.

⁶ <https://www.eggtrack.com/en/eggtrack-europe/>

⁷ <https://www.compassioninfoodbusiness.com/latest-news/our-news/carrefour-to-go-cage-free-across-europe-by-2025/>

and production systems, conversion costs are often front-loaded, and CAP instruments face structural limitations in terms of budget size, targeting, and accessibility. This raises the question of how the transition can be adequately financed, and which complementary public and private financing mechanisms will be required alongside the CAP. At the same time, societal preferences and attitudes, market commitments, and technological innovation, all interact with economic incentives to influence the pace and scope of change.

1.2 Purpose and scope of this report

Against this backdrop, this report focuses on three main aspects:

- the costs of transitioning for laying hens, pigs, rabbits, and calves;
- the financing instruments and sources available to support this transition;
- the wider range of regulatory, non-regulatory, market-based and voluntary instruments, as well as information and knowledge tools, all of which can influence the adoption of alternative housing systems.

Policy instruments can also be grouped into supply-side and demand-side measures (see **Table 2: Typology of policy instruments directly or indirectly relevant for facilitating a transition to cage-free farming** below). Supply-side measures primarily affect production conditions and costs, while demand-side measures influence purchasing decisions and market pull. Within the broader context of sustainability transitions, and particularly in debates on food system transformation, it is increasingly recognised that policy actions must target both supply and demand (Muro & van Vugt, 2025).

Table 2: Typology of policy instruments directly or indirectly relevant for facilitating a transition to cage-free farming

Instrument type		Supply-side example	Demand-side example
Regulatory instruments	Legislative or administrative rules that set mandatory requirements for production, marketing, or labelling.	• Planned EU ban on cages in several sectors (proposal expected 2026). • Equivalence requirements for imports.	• Mandatory animal-welfare labelling.
Economic instruments: a) Financing instruments	Public expenditure/financial transfers (EU/national funds, grants, loans, guarantees) that act	• CAP schemes, e.g. eco-schemes, investment aid etc. • State-aid investment grants. • Loan guarantees.	• Public procurement budgets (e.g., cage-free requirements funded by contracting authorities)

Instrument type		Supply-side example	Demand-side example
	as incentives for production changes.		• EU promotion programme funding.
Economic instruments: b) Fiscal / price-based instruments*	Tax/levy/VAT instruments that alter relative prices but do not transfer public funds.	• Tax incentives for investments in cage-free systems.	• Reduced VAT for cage-free products. • Welfare-related levies/charges on specific livestock products.
Information, education & knowledge instruments	Tools that improve skills, awareness, and innovation capacity building among farmers, consumers, and supply-chain actors	• CAP-funded advisory services. • Horizon Europe and national research projects.	• Public communication campaigns.
Market-based instruments	Instruments that shape market demand for welfare-friendly products by influencing purchasing decisions of public or private buyers.	--	• Sustainable public procurement requirements associated with cage-free products. • EU promotion programmes; quality and GI schemes.
Voluntary instruments	Private and supply-chain-led commitments, certification schemes, or standards that exceed legal requirements.	• Industry codes of practice.	• Retailer cage-free sourcing pledges. • Private animal-welfare labelling schemes.

* Taxes, different VAT levels and levies are shown under non-financial economic instruments because they modify relative prices and tax liabilities without direct budgetary transfers to beneficiaries.

(Source: modified and expanded by the authors from Bemelmans-Videc et al, 1998)

The report provides a **general mapping of regulatory initiatives, supply and demand-side measures across the EU** and is complemented by **in-depth analyses of policy instruments and contextual factors shaping the transition in four Member States**: Germany, France, Spain, and Poland. Their selection was based on the following criteria:

- **Diversity in production size and importance:** These countries represent some of the largest livestock sectors in the EU, covering pigs, laying hens, and rabbits. Spain and France are major producers of pigs and rabbits, while Germany and Poland have significant poultry sectors.

- **Variation in transition pathways:** Germany has adopted ambitious legislation banning farrowing crates by 2036 and phasing out enriched cages for laying hens by 2025. Poland, in contrast, has no national ban but shows strong private commitments. France has partial initiatives for rabbits and regional pilots, while Spain has no ban for pigs and limited initiatives, making it a contrasting case.
- **Presence of national or voluntary initiatives:** Germany stands out for its comprehensive subsidy programs and retailer-driven schemes. Poland demonstrates strong private commitments despite regulatory gaps. France combines regional initiatives with organic production leadership, and Spain illustrates a scenario with minimal coordinated incentives.

This selection allows us to capture a broad spectrum of policy environments, ranging from countries with legislative frameworks in place to phase out cage-based farming to those relying primarily on market-driven and voluntary approaches. It provides a mix of success stories, where advanced transition measures are already in place, and cases where progress remains limited but feasible with the right combination of instruments and incentives.

1.3 Methodology

This study combines a desk-based evidence review with in-depth Member State analysis to explore the financing needs and opportunities for the transition to cage-free farming. The study was implemented in three main steps which are described below.

1. **Evidence review (2021 to present):** We conducted a structured review of literature published from 2021 onwards, covering peer-reviewed articles, reports from EU institutions and Member State authorities, industry and NGO reports, and technical studies that analyse economic impacts, welfare outcomes, and barriers and enablers of transitions for the species in scope, gathering evidence at farm, national (MS) and EU levels. The observation window begins in 2021 since this report builds on two IEEP studies completed in 2020 and 2022⁸. Focusing the review on publications from 2021 onwards

⁸ This review period was defined as the work presented in this report builds on these two studies from 2020 and 2022: Kollenda, E., Baldock, D., Hiller, N. and Lorant A. (2020) [Transitioning towards cage-free farming in the EU: Assessment of environmental and socio-economic impacts of increased animal welfare standards](#). Policy report, Institute for European Environmental Policy, Brussels & London. and J. Urios, D. Baldock, J.-F. Hulot and F. Bas-Defossez (2022) [‘Funding the cage-free farming transition in Europe’](#), Policy Report, Institute for European Environmental Policy

avoids duplication with those baselines and captures new evidence that has emerged since.

Searches were run through Google Scholar⁹, ScienceDirect¹⁰ and ResearchGate¹¹ for academic literature, and Eurostat¹² for EU data. Perplexity AI¹³ was used to identify additional sources not captured through conventional searches. Core keywords included: *cage farming, cage-free farming, transition, barriers, scenario, costs, cage ban, farrowing crates, laying hens, poultry, egg sector, rabbits, does, calves, pigs, EU, economic, environment, farmer exit, regulation, label, cost modelling, animal welfare, climate, financial, health, productivity, piglet mortality, housing system*.

The final evidence base **comprised 24 studies spanning different species, geographies and methods**. In brief, 8 studies focused on pigs, 6 on rabbits, 4 on laying hens, 1 on calves, and 4 covered multiple species. Geographically, 8 were MS-specific (Hungary, France, Netherlands, Bulgaria, UK) and 16 were EU-wide or multi-country. By scale and focus, 13 were farm-level, 8 sector/market, and 5 policy-oriented. Methodologically, the set included 8 literature reviews, 6 modelling studies, 7 empirical/primary-data papers and 3 policy analyses; 16 were peer-reviewed, and 8 were policy/technical reports.

- 2. Policy instrument mapping:** To assess how EU and national policies can support the transition to cage-free farming, we conducted a targeted mapping of public instruments, focusing on those measures with potential relevance for phasing out cages or facilitating a shift toward cage-free housing systems. Building on the analytical approach used in IEEP's 2025 assessment of animal-welfare-related CAP expenditure¹⁴, we screened all Member State CAP Strategic Plans (CSPs) for 2023–2027 using the Catalogue of CAP Interventions. From the 136 animal-welfare related schemes identified in the previous study, we isolated those interventions that explicitly support cage-free systems or that could enable such transitions, namely investment aid for housing conversion, environment-climate-animal welfare schemes with cage-free criteria, and organic farming schemes where relevant. For each intervention, we extracted information on eligibility requirements, target

⁹ <https://scholar.google.com/>

¹⁰ <https://www.sciencedirect.com/>

¹¹ <https://www.researchgate.net/>

¹² <https://ec.europa.eu/eurostat/en/home>

¹³ <https://www.perplexity.ai/>

¹⁴ Godfroy, A and Muro, M (2025) [Improving animal welfare through the Common Agricultural Policy. Report](#), Institute for European Environmental Policy, Brussels.

species, budget allocations for the whole programming period, and planned output indicators.

In parallel, we reviewed non-CAP instruments (State Aid, national subsidy programmes, the EIB agriculture facility) and a range of demand-side tools. For each instrument type, we considered its potential to (i) finance structural investments, (ii) support management adaptations during transition, and/or (iii) strengthen market demand for cage-free products.

3. Country-level analysis: Four Member States, Germany, Poland, France, and Spain, were selected to reflect diverse production scales, policy contexts, and transition progress. Selection criteria included sector importance, legislative status, and availability of national initiatives. For these countries, we compared estimated transition costs with available funding and identified barriers through desk research and stakeholder interviews.

For the interviews, we applied a semi-structured interview guide covering three topics: (i) barriers and enablers of cage-free transition; (ii) cost implications and financing needs; and (iii) the operation of CAP and non-CAP instruments in practice. In total, five interviews were conducted across the four selected Member States, which included representatives of research institutes and industry.

Study limitations

The findings presented in this report are subject to several limitations. First, data availability on the costs of transitioning to cage-free systems remains uneven across species and Member States. For some sectors, particularly rabbits and calves, cost estimates are scarce and often based on small-scale studies or expert judgment rather than comprehensive market data. Second, national reporting on CAP allocations and State Aid measures lacks harmonisation, making it difficult to quantify the actual share of funding directed to cage-free transitions. Third, evidence on productivity impacts and long-term economic performance is limited and highly context-dependent, with variability driven by farm size, management practices, and housing design. Finally, stakeholder interviews provided valuable qualitative insights but cannot fully capture the diversity of perspectives across all regions and production systems. These gaps underline the need for further research, notably on costs and benefits of the transition at farm level, as well as improved monitoring, in order to support robust policy design.

2. TRANSITIONING TO CAGE-FREE SYSTEMS: COSTS, CHALLENGES AND ENABLING FACTORS

Transitioning to cage-free farming requires major changes in housing, management practices, and land use. These changes vary by species, farm size, and national context, and they involve both one-off investments and ongoing costs. Below, we outline the main types of changes and costs, followed by species-specific summaries of financial implications at farm level, broader market impacts and possible levers for facilitating a transition.

Transitioning to cage-free farming involves **three types of change**:

- 1. Infrastructure upgrades:** Farmers often need to construct new housing or retrofit existing buildings to accommodate cage-free systems. This includes installing alternative equipment such as perches, nesting boxes, enriched flooring, and ventilation systems (Urios et al, 2022);
- 2. Management changes** such as new approaches to animal handling, feeding, breeding, and monitoring. Staff training becomes essential to manage increased complexity and maintain animal health (Malak-Rawlikowska et al, 2024); and
- 3. Land use implications,** including increased space requirements for cage-free systems, may necessitate land expansion or reconfiguration, particularly for outdoor or free-range models (Urios et al, 2022).

Costs can be further broken down into **one-off investments and ongoing expenses**. These include **capital investments** for construction, retrofitting, equipment purchase, and land acquisition, **operational costs** covering feed and energy, labour, training, and veterinary care, and **marketing and certification costs** for labelling, branding, and compliance with retailer or processor standards.

The financial implications of moving to cage-free farming are likely to vary depending on a range of factors, including the type of production, farm size, and specific location. Importantly, moving to cage-free systems has knock-on effects beyond the farm. Processors, retailers, and foodservice operators may need to adjust how they source, process, and price products. This can lead to changes in retail prices, procurement practices, and product specifications, with some actors experiencing benefits (e.g., clearer product differentiation) and others facing higher costs or logistical adjustments.

The following sections summarise evidence reported about costs, barriers, and enabling factors for different species.

2.1 Laying hens

Studies reporting comparative costs find that **non-cage systems require more space per hen, more labour time, greater energy demand** (for example for ventilation and heating for larger volumes), and **higher feed intake**, together increasing the cost of production compared to enriched cages at baseline prices (with variability by country and farm scale). **Comparisons of production costs for different housing systems in eight EU and four non-EU countries show that total production costs rise by roughly +22% for barn/aviary systems, +34% for free-range, and +125% for organic systems relative to enriched cages (EU baseline).** These estimates are based on a standardised set of assumptions for each housing type. The following assumptions, which combines field data from commercial farms, results from research stations, and expert judgement from the authors and national data providers, are as follows: First, indoor stocking densities fall from 30 hens/m² in enriched cages to 18 hens/m² in barn/aviary systems and 12 hens/m² in organic systems, increasing housing and equipment costs per hen by +59% and +139%, respectively. Second, labour requirements increase substantially, with hens per full-time worker decreasing from 70,000 in enriched cages to 40,000 in barn/aviary ($\approx +75\%$ labour per hen), 25,000 in free-range ($\approx +180\%$) and 13,000 in organic ($\approx +440\%$) systems. Third, feed intake is assumed to rise by +5% in barn/aviary systems (118g/day vs 112g/day) and +9% in free-range systems (122g/day), reflecting higher activity levels. Finally, other variable costs, including energy, litter and hygiene, are set higher than in enriched cages by around +6% in barn/aviary and +27% in free-range systems (Van Horne & Bondt 2023).

A study assessing the economic impacts of moving from enriched to barn/aviary systems in Hungary concluded that the latter would lead to lower labour efficiency ($\approx -40\%$ hens per worker), higher daily feed use ($\approx +8-9\%$) and higher fixed/energy related outlays, translating into +22–31% higher per egg production costs relative to enriched cages. The assessment was based on data collected through an online survey of 42 enriched cage egg producers, depth interviews with barn and aviary egg producers, as well as a companies specialised in designing and implementing housing systems for laying hens. Findings are broadly in line with the assumptions applied by the study reported above. -related outlays, translating into +22–31% higher per-egg production costs relative to enriched cages.

Studies modelling the broader market impacts of immediate bans of cage-based productions suggests that an **immediate ban would result in the volume of eggs produced in the EU decreasing in the short term** from ~6.9 million tonnes to ~5.6 million tonnes (Majewski et al, 2024, reported in Erdos et al, 2025).

Majewski et al (2024) explain that the decline is mainly driven by the required lower densities. In scenarios where longer transition periods are defined, 2035 and 2045, respectively, production declines are markedly smaller, indicating a gradual stabilisation as farmers invest over the implementation window (Majewski et al, 2024). Importantly, **mortality and productivity performance are heterogeneous across systems and countries**, driven as much by management, design, and genetics as by the broad housing category. Evidence from a multi-country dataset covering a five-year period shows that mortality in barn and aviary systems declined steadily over time, consistent with learning effects and system optimisation as producers accumulated experience with non-cage systems (Schuck-Paim et al, 2021). In practice, these findings suggest that **technical support and advice**, e.g. on how best to design housing and training for staff, **may have the biggest influence on how well cage-free systems perform for animal welfare after the conversion**.

Farmers face large upfront investments for new buildings or retrofits, and these **costs are hardest to manage if the change happens suddenly rather than gradually**, as explained above. Several Member States have already introduced bans on cages, either total (Austria and Luxembourg) or partial, with transition timelines ranging from 2025 to 2030. The latter include France, Germany, Czechia, Wallonia (Belgium), and Slovakia (Majewski et al. 2024).

Over time, most extra **costs can be passed along the supply chain, but only if retailers and consumers are willing to pay higher prices** for cage-free eggs. Available evidence indicates that a substantial share of the higher production costs of non-cage systems is passed on to consumers, though the extent varies across markets (Urios et al, 2022). The EU Egg Market Report (July 2025)¹⁵ indicates the following packing station prices: approximately €2.54/kg for cage eggs, €2.90/kg for barn eggs, €3.50/kg for free-range eggs, and €4.70–5.00/kg for organic eggs¹⁶. While these prices reflect what retailers and processors pay, they can be assumed to strongly influence final consumer prices.

The evidence reviewed above highlights a set of interrelated economic, technical, and market-related barriers that shape farmers' ability and willingness to transition to cage-free systems. A **primary barrier is the scale and timing of investment needs**, as the adoption of new rearing practices, for instance linked to new equipment or housing facilities can translate into substantial upfront

¹⁵<https://www.poultrymed.com/Poultrymed/Templates/showpage.asp?DBID=1&LNGID=1&TMID=178&FID=9066&PID=0&IID=93590>

¹⁶ These premiums broadly align with the farm-level cost differentials estimated by van Horne and Bondt (2023).

capital expenditure, while many of the benefits materialise only gradually over time (Van Horne & Bondt, 2023; Majewski et al., 2024). The need for upfront investment and running costs are compounded by **capital lock-in** in existing cage infrastructure and **limited access to credit**, particularly for smaller farms, and, in some regions, by **constraints related to land availability and planning rules** (Urios et al, 2022). In addition, **concerns over biosecurity risks and animal health and welfare outcomes in poorly designed or managed non-cage systems**, such as feather pecking and keel bone damage in aviaries, create further hesitation among producers, especially where experience with cage-free systems is limited (Schuck-Paim et al, 2021; Van Horne & Bondt, 2023).

Some of these barriers can be mitigated by **establishing predictable and sufficiently long transition timelines** which reduce investment risk and allow farmers to spread conversion costs, as illustrated by modelling results showing markedly smaller production declines under gradual phase-out scenarios compared to immediate bans (Majewski et al, 2024). Targeted financial support, **combining investment aid with transitional income support**, can help address both upfront capital constraints and short-term cost increases, particularly when support is tailored to species, farm size, and regional conditions (Urios et al, 2022; Van Horne & Bondt, 2023). Equally important are **robust technical and advisory services**, which play a critical role in improving housing design, management practices, and staff training, thereby reducing mortality rates and improving productivity over time as learning effects take hold in non-cage systems (Schuck-Paim et al, 2021). Finally, **stable and credible market signals**, such as retailer commitments, public procurement criteria, and labelling schemes, are essential to support cost pass-through and reduce uncertainty about future demand for cage-free products (Urios et al, 2022).

2.2 Pigs

A synthesis of experimental and modelling works shows that **production costs per piglet are ~2–4% higher in temporary and no confinement systems when compared to continuous crating**. This is largely due to **larger pen footprints, greater building volumes, climate control for bigger rooms, substrate provision, and higher labour input** (Moutsen et al, 2023). A modelling study by Baxter et al (2022) suggests that pen design, piglet protection features, flooring and hygiene, and clarity about temporary confinement allowances are crucial for preventing crushing risks and maintaining performance. The authors further conclude that **well-designed and managed systems without permanent crating can achieve performance comparable to crates**, but that farms typically experience a learning curve, during which careful monitoring and gradual adjustments are required.

At the macro level, CAPRI scenario analyses of an immediate EU ban on conventional farrowing crates compared to a 10-year transition period suggest a **decrease in EU pork production by 23.6%, for the immediate ban** scenario, which is only partially offset by higher consumer prices. **However, the 10-year transition window reduces the supply decrease to 8.4%, highlighting once again the importance of phasing in such a transition** (Potori et al, 2023).

The modelling exercise also indicated that such a ban might lead to **carbon leakage effects**, as third-country producers expand to fill trade gaps. According to the analysis, this shift would raise non-EU countries' emissions from the pig sector by 4.2% above the model baseline, equivalent to 5.76 million tonnes of CO₂-equivalent. At the same time, emissions within the EU-27 would fall substantially: GHG emissions from EU pork production decline by 22.3%, or 7.94 million tonnes of CO₂-equivalent, relative to the CAPRI baseline. When these opposing effects are combined, **the net outcome at global level is an overall 1.3% reduction in the pig sector's total GHG emissions** (Potori et al, 2023).

Another impact resulting from the choice of transition timelines are different distributional implications. Short and mid-term investments are likely to be carried by producers, but over time, additional costs will probably cascade down the chain to buyers and consumers (Urios et al, 2022).

At the farm level, likely producer responses appear to mirror the macro-level trends identified above. Indeed, in a survey carried out by the UK's National Pig Association in 2024, 46% of the questioned association members stated that they would exit the industry if they were only given five to ten years to make the transition from traditional crates to flexible farrowing systems (Jarvis, 2024). It is worth keeping in mind, however, that these survey responses do not consider the number of producers who would likely leave the sector anyway. A sizeable share of Europe's farmers is approaching retirement or operate without an obvious successor. Across the EU, about 57% of farm managers are over 55, while only ~12% are under 40 (Sajn, 2025). For that reason, the headline figure probably overestimates how many farms would exit *specifically because* of the transition requirement.

These projections, distributional effects and farmer responses align with the regulatory pathways already adopted in several Member States, where phased approaches to ending farrowing crates are well established. For example, Austria targets 2033 for free farrowing pens ($\geq 5.5 \text{ m}^2$); Germany decided in 2019 to limit confinement to five days post-farrowing with $\geq 6.5 \text{ m}^2$ per pen and a 15-year transition (Malak Rawlikowska et al, 2024).

Regarding animal outcomes, the evidence presents a mixed picture. **Country-level comparisons indicate that piglet and sow mortality are not systematically worse where alternatives are the norm** (SchuckPaim & Alonso, 2022). Likewise, a study conducted on Spanish farms demonstrated that farrowing systems with reduced confinement can have welfare benefits for piglets (reduced stress) without compromising piglet performance or injury due to aggression (Ko et al., 2022). In addition, EFSA (2022b) concluded, based on its comprehensive assessment of all available scientific evidence and expert elicitation, that well-designed free-farrowing systems generally provide superior welfare outcomes for both sows and piglets compared to temporary crating systems. Importantly, EFSA also finds that piglet mortality in free-farrowing systems can be comparable to mortality levels in permanent crates, provided that pens offer sufficient space. A minimum of 6.6 m² available to the sow, equivalent to approximately 7.8 m² total pen area, is identified as the threshold at which piglet mortality does not differ from crated systems.

Conversely, observational studies and surveys report **heightened perceived risk**, such as piglet crushing or concerns about worker safety, when space and protective features are inadequate; these concerns are most acute in no-confinement pens without appropriate design safeguards (Garmendia & Penny, 2025; Baxter et al., 2022). However, there is limited empirical evidence demonstrating higher risks specifically attributable to no-confinement systems; much of the discussion stems from stakeholder perception rather than comparative injury datasets. Moreover, it can be expected that effective stockperson training and an adaptation period improve handling and management in free-farrowing pens, which further mitigates practical safety concerns.

2.3 Rabbits

Rabbits have historically lacked EU-wide farming standards. Sources suggest that several countries already use multi-litter group pens post-weaning (EURCAW-Poultry-SFA, 2021; Van Damme et al., 2023).

A recent comparative study of rabbit housing systems (Bicellular (BI), dual-purpose (DP) and enriched cages designed according to the World Rabbit Science Association guidelines (WRSA cages))¹⁷ by Mondin et al (2021) **found no**

¹⁷ Bicellular cages are a conventional, widely used housing system consisting of two adjacent compartments (often one for the reproducing doe and one for kits) within a single cage structure; Dual-purpose (DP) cages are conventional systems designed to serve both reproduction and growing phases within the same cage type. They are slightly larger and more flexible than bicellular

significant differences in total production costs across systems. Total costs ranged between €1.54 and €1.66 per kg live weight, with the authors suggesting that the lack of clear cost differentiation may result from the small sample size and substantial variability in farm management practices.

Across all systems, feed accounted for the largest share ($\approx 67\%$), followed by reproduction ($\approx 7\%$), antimicrobials ($\approx 5\%$), and energy ($\approx 3\%$). Fixed costs represented $\approx 18\%$, mainly building-related ($\approx 13\%$) and cage depreciation ($\approx 5\%$). **When systems were compared, WRSA cages performed better on feed, antimicrobial, and energy costs, whereas BI cages showed higher antimicrobial costs, and DP cages had higher feed costs.** These advantages, however, were offset by higher reproduction costs (driven by farm-specific factors) and higher cage depreciation, since WRSA systems require more expensive infrastructure.

Overall, the study concludes that total costs do not differ meaningfully across housing systems, while antimicrobial use reductions in enriched WRSA cages suggest potential welfare and public-health benefits. The transition to structurally enriched systems, therefore, appears economically feasible, provided that market prices remain stable. The authors emphasise, however, that these findings are preliminary and call for larger-scale studies that include labour costs and assessments of additional housing systems such as elevated parks and organic systems.

The **group housing of breeding does is particularly sensitive.** Experimental and on-farm evidence finds that full-time group housing of reproducing does often **lowers average productivity and raises kit mortality and injuries due to maternal protective behaviour and hierarchical aggression; part-time group housing**, where does are single-housed during peri-partum and early lactation and grouped later, **can sustain reproductive performance similar to single-litter housing**, especially when escape enrichment (e.g., platforms, tunnels) is provided (Trocino & Xiccato, 2025; Van Damme et al, 2023). **Outdoor and organic systems** enable natural behaviours and may achieve higher welfare scores, but they **expose animals to weather, predators, variable hygiene and disease**, requiring robust management to avoid elevated mortality (EURCAW-Poultry-SFA, 2021).

The literature identifies increased **space and land needs, biosecurity demands, and behavioural management under group settings as the key barriers** for

cages but still lack structural enrichment; WRSA cages follow the World Rabbit Science Association's enrichment guidelines and provide more space, typically including a raised platform that increases usable area.

transitioning to cage-free systems for rabbits. Enablers are **clear technical protocols, R&D networks and digital tools to benchmark performance, as well as labels and premiums to cover higher costs** (EURCAW-Poultry-SFA 2021; Gidenne et al, 2024).

2.4 Calves

Evidence on the costs, and benefits of, enablers and barriers to transitioning to cage-free systems for calves is sparse. Mitova (2024) suggests that moving from individual pens to group housing can improve calf behaviour and day-to-day management **without substantial investment or productivity impacts** when the transition is **phased and supported by regulation**. Importantly, the study **does not provide numerical cost estimates**; rather, its conclusions draw on in-depth interviews with producers and experts, and a scenario scoring framework applied to 25 indicators spanning investment, production, prices, profitability, employment and welfare. Under this approach, a mandatory legislative transition with up to a 10-year phase-in scores moderate to favourable overall, with stakeholders not expecting severe investment burdens, no major production efficiency losses, and only modest price effects relative to the status quo. Notably, the profitability and employment cluster scored highest under the mandatory scenario, suggesting potential gains where mechanisation/automation offset labour needs. On animal outcomes, the literature cited in the study indicates that **group-housed calves develop normal social skills**, adopt **solid feed earlier**, and **cope better with stressors** such as weaning and regrouping, particularly when kept in **pairs or small stable groups**.

For farmers, the main barriers identified by Mitova (2024) include the **remodelling of facilities (space and pen design) and the adjustment of routines (feeding, weaning, health monitoring)**. Enablers include having **clear technical standards, training, and moderate financial support for pen upgrades, alongside phased timelines**.

3. POLICY INSTRUMENTS FOR FINANCING THE TRANSITION TO CAGE-FREE FARMING: EU AND NATIONAL INSTRUMENTS

This section presents an overview of the EU-level frameworks and instruments that may support the transition to cage-free systems. At EU level, the CAP remains the most significant source of funding for the transition. The current CAP (2023–2027) contains several schemes that can support cage-free systems, though uptake varies widely across Member States (Godfroy & Muro, 2025). Looking ahead, the CAP proposals for 2028–2034 CAP¹⁸ and the future MFF¹⁹, published by the Commission in July 2025, may provide new opportunities to fund the transition to cage-free systems at farm-level.

Beyond the CAP, a new funding facility set up by the EIB and national State Aid programmes provides additional funding opportunities. Complementing these economic instruments, information, training and knowledge instruments, such as research and innovation projects funded under Horizon Europe, generate and disseminate technical know-how to support the transition.

Demand-side tools, including public procurement criteria and voluntary corporate initiatives, are briefly touched upon, as they can stimulate market demand for higher-welfare, cage-free products and complement supply-side measures in driving the transition.

3.1 Contribution of the current CAP to animal welfare and cage-free farming

The CAP serves as a key policy instrument to encourage and financially support higher animal welfare standards on farms across the EU, which includes the improvement of the housing conditions of animals. With the most recent CAP

¹⁸ COM(2025) 560 final, Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL establishing the conditions for the implementation of the Union support to the Common Agriculture Policy for the period from 2028 to 2034, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52025PC0560>

¹⁹ COM(2025) 570 final, COMMUNICATION FROM THE COMMISSION “A dynamic EU Budget for the priorities of the future – The Multiannual Financial Framework 2028–2034” <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52025DC0570>

reform for the 2023–2027 period, animal welfare gained increased prominence through its inclusion under Specific Objective 9²⁰.

As a result, the current CAP supports animal welfare in different ways. First, the basic condition for receiving any CAP payments is compliance with the so-called Statutory Management Requirements (SMRs), which essentially reference existing EU legislation, including the ones related to animal welfare. Besides these requirements, the CAP may contribute to supporting animal welfare thanks to the financial support provided through the CAP strategic plans.

The current CAP introduces a 'new delivery model'. This gives the MS increased flexibility on the measures they use relative to the system in the past, within national CAP budgets that are pre-determined for each MS in a prior negotiation over the allocation of the overall EU budget. For the first time, MS are obliged to develop national CAP Strategic Plans (CSPs) for the period. These plans outline how Member States intend to meet CAP objectives as well as other relevant EU policy targets, particularly those related to climate, environment, and biodiversity. As a result, Member States are given flexibility to design and adopt the support schemes they consider relevant, as well as to decide on the allocation of the budget between these support schemes.

The support delivered through these CAP Strategic Plans comes from two funds:

- **The European Agricultural Guarantee Fund (EAGF)** finances direct payments to farmers and market support measures, previously referred to as Pillar I of the CAP. The direct payment measures adopted by Member States in their CSPs are 100% funded by the EAGF, which means that there is no MS cofinancing.
- **The European Agricultural Fund for Rural Development (EAFRD)**, which supports rural development. Previously referred to as Pillar II measures, including environmental schemes and support for disadvantaged areas. Unlike the EAGF, the measures funded by the EAFRD are generally multiannual and (for the most part) co-financed by Member States, at variable rates.

²⁰ "to improve the response of Union agriculture to societal demands on food and health, including high quality, safe and nutritious food produced in a sustainable way, to reduce food waste, as well as to improve animal welfare and to combat antimicrobial resistance", Article 6(i), Regulation (EU) 2021/2115 establishing rules on support for strategic plans to be drawn up by Member States under the common agricultural policy (CAP Strategic Plans)

As a result, these two funds can support a set of support schemes, designed by Member States, which may contribute to improving the welfare of animals and their housing conditions:

- **Eco-schemes:** Payments introduced under the current CAP, which are voluntary, typically annual, schemes financed by the EAGF that reward farmers who adopt practices going beyond legal minimum standards, and that benefit the environment, climate or animal welfare. With some exceptions, Member States must dedicate at least 25% of their direct payments budget to them. This means that, for the first time, animal welfare improvements can be incentivised through a share of the EAGF budget.
- **Environment, climate and animal welfare schemes** (including aid for organic farms) (**ENVCLIM**): Multiannual schemes financed by EAFRD and co-financed by the Member States offering payments for farmers who voluntarily adopt or maintain practices that help with climate change, protect natural resources, preserve biodiversity or involve farm animal welfare practices more beneficial than required by legislation.
- **Investment Aid (INVEST):** Investment schemes are funded by the EAFRD, are co-financed by Member States, and can contribute to all ten specific objectives of the CAP. Investment aid measures support both "productive" and "non-productive" investments on farms. Non-productive investments are those that address needs not directly related to farm output, such as stabilising landslides, restoring hedges, or creating habitats for biodiversity. Productive investments, on the other hand, include buildings, machinery, and on-farm infrastructure, including renewable energy installations. Individual schemes may support multiple CAP-specific objectives, and Member States are not required to estimate the extent to which a scheme contributes to each objective in their CSPs.
- **Knowledge exchange:** These support schemes may contribute to the improvement of animal welfare. Knowledge exchange schemes aim to provide support for advisory services to help farmers adopt better practices and share information, for instance, about practices beneficial to animal welfare.

When adopted by Member States, these schemes could contribute to improving the housing conditions of animals, including through supporting cage-free practices. Typically, eco-schemes and measures for the environment, climate and animal welfare compensate farmers for adopting certain farming practices, including the adoption of housing practices better for animal welfare. Investment

schemes, on the other hand, might support the purchase of new equipment, as well as the construction or improvements of housing facilities. As a result, investment schemes may support the structural investments which may be necessary to adopt alternative housing practices, such as barn systems for laying hens and collective pens for calves. Finally, knowledge exchange schemes might contribute to facilitating the uptake of alternative rearing practices through the diffusion of advice or the provision of training.

3.1.1 The contribution of the current CAP to cage-free practices

Using the information provided in the Commission's Catalogue of CAP interventions²¹, we identified a total of seven support schemes which explicitly support cage-free farming²². Among these schemes, three are investment measures, which can provide support for farmers aiming to transition towards cage-free systems:

- Cyprus, INVEST, (A.A 4.1.2): For this support scheme, are listed as eligible for support, "Investments to the conversion towards cage-free system in poultry farming". The investments to be eligible must meet a "scoring criteria", for which a significant priority will be given to investments involving non-cage systems.
- Greece, INVEST, (Π3-73-2.8): This scheme also supports investments supporting the conversion of poultry farms towards cage-free systems for laying hens. Furthermore, this scheme may also support the investment towards equipment purchased to reduce individual confinement for sows and calves.
- Latvia, INVEST, (LA4.1.3): For this support scheme, many types of investment may be supported, among which investment aiming to support the move towards cageless systems in livestock farming.

In total, 198 investments are expected to be covered under these schemes, for a total budget of EUR 37,7 million. However, given that these schemes serve multiple objectives and thus provide financial aid to a range of practices, only a share of the budget is likely to go towards actions to phase out cage farming.

It must be noted that other investment schemes may support investment which can contribute to the adoption of cage-free practices. The ones listed above

²¹ https://agridata.ec.europa.eu/extensions/DashboardCapPlan/catalogue_interventions.html

²² MS that adopted these measures are: Cyprus, Greece, Spain, Latvia, Finland and Slovenia

concern the investment schemes aiming expressively to support, among other objectives, the transition towards cage-free farming.

Beyond these schemes, two schemes adopted by Spain and Slovenia, aim to support cage-free farming in the poultry sector. The Spanish CSP incentivises measures to phase out cage farming through one environment and climate scheme, which, however, serves multiple objectives. Slovenia also provides such a scheme for poultry farmers, which specifies that the support will not be granted for laying hens reared in cages, even enriched ones. In total, EUR 115 million will be allocated to these two schemes for the 2023-2029 period.

Finally, two support schemes aim to support free farrowing practices. In this regard, Italy adopted a scheme for the environment and climate, which can support free farrowing practices. For this scheme, Italian regions can provide support to farmers for certain farming practices beneficial to animal welfare, and free-farrowing practices can be supported by a region in this context. However, it must be noted that, within this scheme, free farrowing is eligible alongside a substantial number of practices. However, Finland adopted a scheme which is specifically dedicated to promoting free farrowing practices²³. To be eligible, farmers must ensure that sows can move freely before, during, and after the farrowing period. When using farrowing pens, these must meet specific criteria: a minimum size of 7 m², a solid floor, and a turning diameter of at least 170 cm. In addition, appropriate nesting material must be available to the sow at all times, and piglets must have access to at least 1 m² of space where they are protected from being crushed. To this end, Finland set payment rates at EUR 555 per livestock unit (LSU) per year. While this provides meaningful support, it may not fully cover the cost of new farrowing infrastructure, especially since the payment is made annually.

Additionally, four support schemes adopted by Member States²⁴, are dedicated to improving the farrowing conditions of sows, but do not promote cage-free practices, as they still permit the use of farrowing crates, although limited in time or associated with minimum space requirements.

Therefore, **it appears that only a small number of CSP support schemes specifically address the phasing out of cage farming**, and only one of these schemes is exclusively aimed at this objective. As a result, the phasing out of cages for certain species is only addressed through general investment or organic schemes, notably for rabbits and calves. Given the considerable impact that cage

²³ Approved CAP Strategic plan, Finland, August 2022, <https://mmm.fi/cap27/cap-suunnitelma>

²⁴ These schemes were adopted by Croatia, Italy, Finland and Spain.

farming has on animal welfare, and the significant number of animals still reared in cages, this is a missed opportunity. In this regard, around 50% of laying hens in the EU are still reared in cage (Majeski et al., 2024), while 85% of the EU rabbit meat production in 2017 relied on barren cages (European Commission, 2017), while between 86 and 95% of sows are still confined in farrowing crates during the lactation period (Malak-Rawlikowska et al, 2024).

3.1.2 The role of organic farming in the transition towards cage-free farming

Under the current CAP, many Member States decided to allocate CAP support to the development of organic farming. The **schemes supporting organic farming practices, when directed towards the livestock sector, may influence the housing conditions of animals.** In this regard, the Regulation for Organic Production and Labelling of Organic Products ('Organic Regulation')²⁵ lays down several requirements for farmed animal production. According to Article 1.6.8. of the regulation, cages shall not be used for any livestock species. Moreover, Article 1.4.1 of the regulation mentions that all farmed animals except pigs and poultry must have permanent access to pasture, whenever conditions allow, or have permanent access to roughage. However, it must be underlined that the regulation does not prohibit the use of farrowing crates in pig farming.

As a result, the CAP schemes adopted by Member States aiming to support organic farming can potentially contribute to the development of cage-free practices.

Overall, it also remains uncertain to what extent the CAP schemes aiming to support cage-free farming actually support the "transition" and not only support existing cage-free practices. As a matter of fact, for several of these support schemes, the main requirements are related to the maintenance without cages, meaning that farmers who have already transitioned would receive this payment without changing their practice.

Additionally, according to a report by the European Court of Auditors (2024), despite almost 60 % of the EU's organic area covered by permanent grassland and fodder, the share of organic production in livestock farming remains rather low: in 2020, it concerned 6% of the cattle population, 3.6% of the poultry population and 1% of the pig population. This mismatch can be linked to the "area-based" form of payments for organic farming under the CAP, which led in certain Member States to an increase in organic permanent grassland and fodder,

²⁵ Regulation (EU) 2018/848 on organic production and labelling of organic products and repealing Council Regulation

without a significant effect on the share of livestock under organic farming (European Court of Auditors, 2024). Therefore, it is important to ensure that CAP support for organic farming reaches livestock farmers.

Certain CAP Strategic Plans already target this issue. For instance, Austria provides support for permanent grassland and fodders, which is three times higher for farmers with organic animals²⁶, while in certain Italian regions, the support for organic permanent grassland is only paid to farmers with livestock animals²⁷. The aforementioned points highlight the opportunity for Member States to better target organic livestock production. Nevertheless, the conversion of livestock farms towards organic production requires the adoption of relevant targets at EU level. These targets should address broader dimensions of the sector, going beyond the objective of 25 % of organically farmed agricultural land by 2030²⁸.

As a result, a careful assessment should be realised by Member States when designing their CAP strategic plan, to assess the financial needs of the different sectors to transition towards cage-free farming; to evaluate what level of payments should be dedicated to support the transition and what level should be dedicated to farmers who already adopted cage-free farming.

3.1.3 The CAP for the period 2028 – 2034: Opportunities and risks

The European Commission published its **proposals for the Common Agricultural Policy (CAP) for 2028–2034 on 16 July 2025, alongside the Multiannual Financial Framework (MFF)** (European Commission, 2025b). The proposals are presented across several interlinked documents that require parallel reading and, in some areas, leave room for interpretation. The European Commission's proposals introduce significant structural and budgetary reforms. Most notably, the **CAP will be integrated into a broader fund, the European Fund for economic, social and territorial cohesion, agriculture and rural, fisheries and maritime, prosperity and security**²⁹ (NRPF in short), effectively ending the two-pillar model that has defined CAP since 2000. While the CAP remains a distinct policy area and **funding for core CAP measures is ring-**

²⁶ Austria, approved CAP Strategic plan, 2022, https://agriculture.ec.europa.eu/cap-my-country/cap-strategic-plans/austria_en

²⁷ Italy, approved CAP strategic plan, 2022, <https://www.reterurale.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/24037>

²⁸ COM(2021) 141 final COMMUNICATION FROM THE COMMISSION ON AN ACTION PLAN FOR THE DEVELOPMENT OF ORGANIC PRODUCTION <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A52021DC0141>

²⁹ COM/2025/560 final: Proposal for a Regulation of the European Parliament and of the Council establishing the conditions for the implementation of the Union support to the Common Agriculture Policy for the period from 2028 to 2034

fenced, in the future CAP instruments will form one chapter within much broader National and Regional Partnership Plans (NRPPs), which will cover all funding available under the NRPF (Hart & Baldock, 2025).

The proposed CAP regulation outlines a new architecture of support measures, with €295.7 billion allocated to “income support” interventions. These include a broader set of CAP interventions beyond traditional direct payments like Basic Income Support for Sustainability Scheme (BISS), the Complementary redistributive income support for sustainability (CRISS), and the Small Farmer scheme. It includes agri-environmental and climate actions (AECA, combining the current eco-schemes and agri-environment and climate commitments), investment support, risk management, and aid for young farmers and farm relief services. Coupled income support and payments for areas facing natural constraints also fall under this expanded category. Under the current CAP (2023–2027) there is ring-fencing for environmental and climate-related spending that also includes animal welfare (i.e. 25% for eco-schemes and 35% for environment and climate in rural development). The proposed future CAP would remove that mandatory ring-fencing and merge eco-schemes with AECA, requiring co-financing from Member States, which raises concerns about the future scale of environmental and animal welfare spending (Hart & Baldock, 2025).

The reform also expands the list of mandatory measures for Member States, including Coupled Income Support (CIS), which observers argue could crowd out funding for more environmentally ambitious schemes (ibid.). Conditionality requirements have been weakened, with “farm stewardship” replacing GAEC standards and offering Member States greater flexibility in implementation.

Despite these setbacks, the proposal introduces some positive elements. Degressive income support payments will be capped and targeted to farmers most in need, and Member States will be allowed to fund transition plans for farmers moving toward more resilient production systems. **Support for the extensification of livestock systems is now mandatory in areas with nitrogen surplus, potentially benefiting lower-density, pasture-based models.**

The implications of the CAP reform for animal welfare, and specifically for financing the transition to cage-free farming, are mixed. On the one hand, the **removal of ring-fencing and the requirement for co-financing may discourage Member States from prioritising animal welfare measures.** However, despite the absence of ring-fencing, it is reasonable to expect that many Member States will continue to finance well-established and successful schemes, as CAP programming often shows a degree of continuity across funding periods.

On the other hand, the CAP proposal explicitly includes **animal welfare as one of six environmental and climate priority areas** (Article 4), creating a potential pathway for Member States to support cage-free systems through agri-environmental and climate actions, investment support, and other interventions. One of the more promising developments is the **introduction of transition payments for farmers shifting toward more resilient production systems** (Article 10), which could be financed through agri-environmental and climate actions. These payments are explicitly presented as schemes to facilitate structural change, such as the transition to organic or other agroecological models, by offsetting the financial hurdles involved in transforming production practices and systems. According to the Commission (2025c), transition payments could be worth up to €200 000 per farm to support this type of transformation toward sustainability under the new framework.

If implemented effectively, these payments could offer targeted support for cage-free farming. As explained above, the upfront costs of converting from conventional to cage-free systems, including new housing infrastructure, altered management practices, and potential short-term productivity adjustments, can pose significant barriers for livestock producers. Transition payments could help compensate for these investment and adjustment costs, making the shift more economically feasible for farmers willing to adopt higher animal welfare standards. However, because the new CAP proposal gives Member States greater flexibility in designing the various support measures, whether these schemes are used to facilitate the transition to cage-free farming will ultimately depend on the priorities set by each country, as well as the co-financing rates, which are likely to shape how transition payments are targeted. The adoption of EU legislation on animal welfare could also influence the design of these payments by Member States.

In addition, the CAP retains funding for innovation, knowledge exchange, and advisory services, which could be strategically used to support farmers in adopting cage-free models.

Before Member States prepare their NRPPs, the **Commission will issue country-specific recommendations, including on the CAP**. MS are required to take these recommendations into account when drafting their plans. According to the draft NRPP regulation, each plan must set out how the identified challenges, and the country-specific recommendations will be addressed, as well as the level of funding allocated to them (Article 22). Although Member States are not obliged to implement every recommendation, this requirement is expected to give the Commission's guidance greater weight than in the current period, when similar recommendations were issued ahead of the CAP Strategic Plans but had no binding effect. In addition, Member States must show that their

NRPPs make a meaningful contribution to the environmental and climate priority areas outlined in the proposed CAP Regulation and that the plans support the Union's broader climate and environmental objectives (Hart & Baldock, 2026).

3.2 EU-level investment and blended finance instruments

While the Common Agricultural Policy (CAP) remains the principal source of public funding for agriculture in the EU, its allocations are unlikely to be sufficient or adequately targeted to finance the transition to cage-free farming in the EU. **The European Investment Bank (EIB), as the EU's financial institution, plays a complementary role by mobilising long-term investment and de-risking private capital for projects aligned with EU policy objectives** (European Parliament, 2025). Operating on a non-profit basis, the EIB provides loans, guarantees, and advisory services to support economically viable projects that advance climate action, environmental sustainability, and innovation. Historically, however, agriculture has accounted for only a small share of EIB financing, around 6% of its portfolio in 2024 (EIB, 2025a).

Against this backdrop, the **EIB's new €3 billion facility for agriculture, forestry, and aquaculture (2025–2028)**, announced in December 2024, represents a significant strategic shift³⁰. The facility is part of a new EIB agriculture and bioeconomy action plan, building on the recommendations of the Strategic Dialogue on the Future of EU Agriculture (2024). The core of the programme is an **earmarked €3 billion for loans targeted at agricultural and related bioeconomy activities within the EU**. The EIB anticipates that participating financial institutions will match these loans to generate a total of €8.4 billion in long-term sectoral investment. These partners will benefit from EIB advisory support, including the "Green Gateway" programme, and especially the enhanced Green Eligibility Checker³¹, an online tool which is designed to guide intermediary banks in assessing the eligibility and climate impact of green investment projects (EIB, 2024).

The **facility targets SMEs (approximately 70% of financing), mid-caps, and, to some extent, farm-level operations as well as companies in the agri-food and bioeconomy value chains**. SMEs vary greatly in size and include enterprises with up to 250 employees. The maximum project size is €200 million. Three categories within agriculture are to be given some priority e.g. by ear-marking a proportion of the loans. These are: young or new farmers, including for land

³⁰ Description of the financing facility based on '€3 billion of EIB Group financing announced for farmers and bioeconomy', EIB press release 10 December 2024

³¹ <https://greenchecker.eib-group.org/eib-green>

acquisition; green investments supporting EU sustainability objectives, encompassing soil health, water management, climate resilience, digital tools, and training, and gender equality, aiming to increase the proportion of farms managed by women beyond the current 31.6% (EIB, 2024).

This could provide opportunities to accelerate the transition to cage-free farming through several of the mechanisms and instruments set out to implement the facility:

- Long-term financing with maturities suited to large-scale infrastructure upgrades.
- Blended finance solutions, combining EIB loans with CAP/EAFRD grants and EIF guarantees to reduce risk and improve affordability (EIB, 2024b).
- Advisory support via the Green Gateway and Green Eligibility Checker, enabling intermediaries and farmers to structure projects that meet sustainability and animal welfare criteria.
- Direct lending to cooperatives and farmer organisations, facilitating collective investments in cage-free systems.

Early implementation of the facility, such as the €200 million agreement with France's BPCE and the €250 million securitisation with Santander in Spain, suggests that several of its priorities are already being operationalised in national agreements (EIB, 2025b; EIB 2025c). To date, there is no evidence that these agreements include funding for cage-free transitions. However, the instruments could be leveraged to support animal welfare improvements.

While the EIB's facility represents a significant step forward in addressing structural financing challenges in the agri-food sector, an emphasis on funding of 'sizeable projects', with budgets available for investments of up to €200 million, could be read as a focus on larger projects, farmers or agri-food businesses. This may exclude smaller scale farms and micro-enterprises, which often lack the capacity to engage with large financial institutions or meet the scale requirements of such programmes. Unless financial intermediaries develop tailored products for these actors, the facility risks reinforcing existing disparities in access to finance.

3.3 State Aid and national support programmes

Under EU law, animal welfare is explicitly recognised as a legitimate objective for State Aid in agriculture. The Agricultural Block Exemption Regulation (ABER)³² includes Article 31 on “Aid for animal welfare commitments”, which **allows Member States to grant aid to farmers who voluntarily undertake to implement animal welfare improvements beyond legal minimum standards**, including improved feed and care, housing conditions that better accommodate animals’ freedom of movement and comfort, outdoor access and grazing, and practices facilitating natural behaviour and robustness (e.g. slower growing breeds).

Complementing the Regulation, the 2022 “Guidelines for State aid in the agricultural and forestry sectors and in rural areas” (ASAG)³³ set out the criteria the Commission applies when assessing state aid measures compatible under Article 107(3)(c) TFEU. The Guidelines explicitly cover state aid for agri-environment-climate and animal welfare commitments, emphasising that aid must have an incentive effect, be proportionate, and contribute to public policy objectives without unduly distorting competition.

This means that **Member States are in principle allowed to provide targeted support for above-minimum standards welfare measures**, such as investment in improved housing systems, systems that enhance natural behaviour expression, and other welfare-oriented practices.

In addition, the “Agricultural de minimis Regulation”³⁴ allows Member States to grant small amounts of aid without triggering full State Aid procedures. A revised Regulation entered into force in 2024 and will apply until 31 December 2032, increasing the maximum de minimis ceiling per beneficiary over three years from €25 000 to €50 000 and raising the national cap (expressed as a percentage of agricultural output) from 1.5 % to 2 %. The amendment also removes the ‘sectorial cap’ that previously limited how much of a national ceiling could be devoted to a single product sector and introduces a mandatory central register to increase transparency of de minimis aid reporting. These changes make de minimis aid a

³² COMMISSION REGULATION [\(EU\) 2022/2472](#) declaring certain categories of aid in the agricultural and forestry sectors and in rural areas compatible with the internal market in application of Articles 107 and 108 of the Treaty on the Functioning of the European Union.

³³ COMMUNICATION FROM THE COMMISSION: Guidelines for State aid in the agricultural and forestry sectors and in rural areas, [\(2022/C 485/01\)](#)

³⁴ Commission Regulation [\(EU\) 2024/3118](#) amending Regulation (EU) No 1408/2013 on the application of Articles 107 and 108 of the Treaty on the Functioning of the European Union to de minimis aid in the agriculture sector

more flexible tool for Member States, lowering administrative barriers for targeted welfare support.

A fundamental principle of EU State Aid law is that **aid should not compensate for compliance with mandatory legal requirements**. The above regulations specify that aid may be granted only for commitments that go beyond the relevant mandatory standards established by EU or national law. In the event the EU adopted mandatory welfare legislation, for example, banning certain cage systems and making cage-free farming the legal minimum, State Aid could not be used to pay for compliance costs associated solely with meeting this new legal baseline because that would effectively subsidise a mandatory obligation rather than incentivise voluntary improvements. However, **State Aid could potentially still be used to facilitate the transition to new regulatory standards during a defined adjustment period**. Whether such transitional support would be permissible under State Aid rules, and how it could be designed without breaching the principle of non-compensation for mandatory compliance, is a question that warrants further clarification.

3.4 Other supply and demand-side instruments

Information, knowledge and demand-side instruments play an important role in driving animal welfare improvements by influencing producer behaviour, buyer requirements, and consumer demand. The subsequent sub-sections provide an overview of the EU's key programmes and frameworks for information and knowledge production and provision, as well as public procurement. It also presents existing international voluntary business standards. National information, knowledge and demand-side instruments and initiatives are presented in Section 4. Finally, this section does not cover the EU animal-welfare label because, despite its inclusion in the Farm to Fork Strategy, there has been no substantive progress. The revision of the animal welfare legislation is ongoing, with legislative proposals expected in 2026.

3.4.1 Fiscal and price-based instruments

Fiscal instruments can help align prices with the higher fixed and operating costs of cage-free systems and generate predictable, multi-year revenue to co-finance farm conversions. While **taxation is a Member State competence**, the **EU framework** (promotion policy, procurement guidance, finance, and forthcoming welfare legislation) **can complement national measures** so that price signals and demand evolve together (Urios et al, 2022).

3.4.2 Information, education and knowledge instruments

The evidence reviews in Section 2 suggest that performance gaps in non-cage systems are influenced by **management practices and design choices**. Advisory services, training, and applied research help shorten learning periods (e.g., in aviaries and free-farrowing pens). **Horizon Europe**, the Commission's main research and innovation funding programme, together with **EFSA scientific opinions** used to prepare the legislative revision, remain key EU-level mechanism to test and generate evidence on housing designs, enrichment, biosecurity protocols and labour-saving practices.

Horizon Europe finances multi-country research and innovation actions that develop technical solutions, management practices, and socio-economic models for higher animal welfare systems³⁵. To better align national and EU animal health and research agendas, strengthen R&I capacity and increase the knowledge base on animal welfare, and to increase the uptake of research and solutions by potential users, the Commission launched the **European Partnership on Animal Health and Welfare** in 2024. The Partnership's mandate includes the coordination of research priorities, reinforcement of veterinary and advisory capacities, and the development of evidence-based tools that can later underpin **species-specific transition periods** in the forthcoming EU animal-welfare legislation. It is also expected to support the **cross-border exchange of applied knowledge**, for example, on housing design, monitoring technologies, and management practices that influence mortality, behaviour and environmental outcomes³⁶.

To support enforcement, capacity building, and knowledge dissemination in specific species groups, the Commission established several **EU Reference Centres for Animal Welfare (EURCAWs)**: **EURCAW-Pigs**³⁷ was set up in 2018 and **EURCAW-Poultry and other small, farmed animals (SFA)**³⁸ in 2020. They provide technical studies, training, and best practices examples to national authorities and inspectors. The Centres' remit covers welfare on-farm, during transport, and at slaughter. For poultry, rabbits and small farmed animals, EURCAW-Poultry-SFA's **2025–2027 work programme** prioritises themes highly relevant for the cage-free transition: **broiler welfare, alternative laying-hen**

³⁵ Examples of current projects can be found at https://agriculture.ec.europa.eu/overview-vision-agriculture-food/research-innovation/livestock-systems_en

³⁶ <https://www.eupahw.eu/>

³⁷ <https://eurcaw-pigs.eu/about-eurcaw-pigs>

³⁸ <https://eurcaw-poultry-sfa.eu/en/minisite/sfawc/welcome-european-reference-centre-animal-welfare-poultry-and-other-small-farmed>

systems, stunning and killing methods, and rabbit welfare with a focus on alternative housing systems.

The focus of EU research and innovation funding beyond 2027 will be decided in the context of the next Multiannual Financial Framework and the legislative process for the successor to Horizon Europe. The European Commission formally unveiled its proposal for the **10th Framework Programme for Research and Innovation (FP10)**³⁹, to run from 2028–2034 with a proposed budget of around €175 billion as part of the MFF package adopted by the Commission on 16 July, but final priorities, structure, and budget allocations will be negotiated and adopted by the European Parliament and the Council through the ordinary legislative procedure before the new programme begins. This process will determine the extent to which future EU-funded research can continue to support **knowledge generation, advisory capacity and innovation uptake** in the transition towards higher-welfare, cage-free livestock systems.

3.4.3 Market-based instruments

Public catering can provide early demand certainty for higher-welfare products and stabilise prices during conversion. Considering the financial weight of the public catering sector, it has a noticeable effect on demand, as for instance, it represented approximately USD 30 billion in 2024 in a Member States like France⁴⁰. Public procurement in the EU is governed by a set of directives that provide a framework for the purchasing of goods and services by public authorities. The main regulation is the EU Public Procurement Directive⁴¹ which sets rules for awarding contracts based on the Most Economically Advantageous Tender (MEAT) rather than lowest price alone. This approach allows contracting authorities to include environmental and social criteria linked to the subject matter of the contract. These rules aim to ensure transparency, fair competition, and value for money while enabling sustainability objectives to be integrated into public spending.

To support the latter, the European Commission created the **Green Public Procurement (GPP) platform and a library of criteria**. GPP is voluntary under the current directive, but it provides practical tools for authorities to include

³⁹ [COM/2025/543](#) final: Proposal for a Regulation establishing Horizon Europe, the Framework Programme for Research and Innovation, for the period 2028–2034 laying down its rules for participation and dissemination,

⁴⁰ <https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food+Service+--+Hotel+Restaurant+Institutional+Annual+Paris+France+FR2025-0013.pdf>

⁴¹ [Directive 2014/24/EU](#) of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC

sustainability requirements in tenders. For example, contracting authorities can reference EU Ecolabels and apply life-cycle costing. Member States may also adopt sector-specific minimum criteria in their national rules⁴².

The Commission's **2019 GPP criteria for food, catering and vending services already included animal-welfare considerations among technical specifications and award clauses**. These criteria cover aspects such as non-cage systems, organic sourcing, fair trade, plant-forward menus, and waste prevention (Boyano Larriba et al, 2019). In **2025, the Joint Research Centre (JRC) published comprehensive guidance on Sustainable Public Procurement (SPP) for food, food services and vending**. This new guidance integrates environmental, social (including health, nutrition and animal welfare) and economic dimensions, moving beyond the purely environmental focus of GPP. It collates over 500 criteria used across Member States and proposes voluntary EU-level SPP criteria, with examples and monitoring approaches. The criteria can be used by contracting authorities to specify cage-free eggs, higher-welfare meat, as well as dairy, nutrition targets, and plant-forward menus requirements when tendering contracts (Garcia Herrero et al, 2025).

In early 2025, the Commission published a **roadmap for reforming its public procurement framework**. The planned changes aim to expand non-price criteria, strengthen sustainability requirements, and explore joint procurement to support climate and industrial goals. A legislative proposal is expected in 2026 (Nicoli, 2025).

In 2026, the Commission will allocate **€205 million** to co-fund **promotion activities for sustainable and high-quality EU agri-food products within the EU and globally**, according to the 2026 promotion policy work programme adopted in December 2025 (European Commission, 2025d). This represents the **highest annual allocation to date** and underscores the role of promotion policy in enhancing consumer awareness of European agricultural products and quality schemes. Of this total, **€160 million** will be made available as grants to co-fund programmes run by producer groups and agri-food organisations. Funding for promotion in the **EU internal market (€79.7 million)** and in **non-EU markets (€70.3 million)** aims to strengthen recognition of EU production standards, support market diversification, and raise the profile of sustainably produced food.

Although the work programme does not earmark funds specifically for animal welfare, it explicitly includes **programmes increasing awareness of EU sustainable agriculture and animal welfare**, both in "simple" and "multi"

⁴² https://green-forum.ec.europa.eu/green-business/green-public-procurement_en

programmes. In 2026, these strands are financed under internal-market envelopes: **€6.6 million** for simple programmes and **€13.7 million** for multiple programmes. Programmes highlighting **production-method features, including animal welfare**, are also eligible in both the EU market and third-country markets. This creates an opportunity for applicants to design **promotion actions that highlight cage-free systems**, their welfare benefits, production characteristics, and the management of costs associated with transitioning away from cages.

3.4.4 Voluntary business standards

Retailers, manufacturers and food-service operators can drive the cage-free transition through **public sourcing pledges and reporting**. A core international instrument in this domain is the **OECD Guidelines for Multinational Enterprises on Responsible Business Conduct (RBC)**, which set out expectations for companies to respect human rights, environmental protection and broader sustainability issues in their operations and value chains. The **2023 update explicitly integrated animal welfare as an element of due diligence**, requiring enterprises to respect welfare standards aligned with the World Organisation for Animal Health (WOAH) Terrestrial Animal Health Code, ensuring animals are healthy, comfortable, well-nourished, safe, and able to express natural behaviours (OECD, 2023).

Although the OECD Guidelines themselves are voluntary and not legally binding, they are widely regarded as global best practice standards for corporate conduct and are integrated into the corporate responsibility frameworks of many multinationals and governments. The Guidelines' implementation mechanism, the National Contact Points (NCPs) for Responsible Business Conduct, exists in all countries adhering to the Guidelines and serves as a non-judicial grievance mechanism that can receive complaints alleging non-compliance with the Guidelines. NCPs help raise awareness, promote uptake of RBC standards, and mediate disputes between stakeholders and companies (OECD, 2023).

In 2025, the first OECD-Guidelines-based animal welfare complaints were brought to the Dutch NCP, including one involving Dutch production practices, illustrating the reputational risk for companies failing to comply with voluntary standards (Dutch News, 2025).

4. THE TRANSITION TO CAGE-FREE FARMING IN SELECTED MEMBER STATES: PROGRESS AND BARRIERS

This section synthesises findings of the country analyses carried out for Germany, France, Spain, and Poland, each focusing on two species per Member State. The full country analyses are presented in Annexes 1 – 4. While the annexes offer granular data and case-specific insights, this section distils the main trends, barriers, and enabling factors observed across the four countries, focusing on

- Regulatory and policy frameworks;
- Economic implications and cost estimates for conversion;
- Funding instruments and financial gaps at national level;
- Demand-side measures and market dynamics influencing uptake.

4.1 Key characteristics of the livestock sectors covered

This section offers a brief overview of the sectors examined in each Member State focusing on production scale and trends, the main housing systems, national initiatives to phase out cage farming, and consumption and trade figures. **Table 3** presents a comparative overview.

Table 3: Context of the production for the species selected for the Member States analysis

Member State	Animal category	Production size	Cage use	National initiatives
Germany	Pigs	21.3M heads (2024); ~63% of national meat output (2025). Sows: ~1.4M	Gestation crates phased out by 2029; farrowing crates limited to ≤5 days by 2036.	Federal 'Umbau der Tierhaltung' (€1bn, investments + ongoing costs; ends Sep 2026); Rentenbank loans; Länder programmes; Initiative Tierwohl / Haltungsform; mandatory husbandry label from March 2026.
	Laying hens	51M heads; 13.7B eggs (2024)	Small-group cages ~4% in 2024; ban on all cage systems by end-2025.	
Poland	Laying hens	Laying hens: >50M heads; ~8.2% of EU eggs (2024)	~67% in enriched cages (2023)	Eco-scheme I4.6 'Dobrostan Zwierząt' (cage-free hens); 140+ company cage-free pledges by 2025.

Member State	Animal category	Production size	Cage use	National initiatives
	Calves	6.2M of cattle heads incl. 2.2M dairy cows; major calf production.	Most of the calves population is raised following basic EU legislation.	Investment I10.15 (group-housing for calves); KPO 'RoInictwo 4.0'
France	Rabbits	25,280t rabbit meat; (2023); ~50% EU organic rabbit production; production declining.	>90% in collective cages; ~10% in floor/elevated pens.	CAP sectoral support for rabbit POs & transitions; Organic support; 'Lapin & Bien' and Terrena committing to cage-free rabbits by 2026.
	Calves	4.63M bovines <1 year (2023); 516,752 calves slaughtered for 154,000t veal (2023)	Commonly individual pens for 3–4 weeks, then group housing within dairy farms, while suckler calves can still be commonly kept in individual pens; organic bans individual pens after 1 week.	CNIEL–NGO declaration promoting collective calf housing; Colocavo pilots for early group-housing.
Spain	Pigs	34.6M heads; 53M slaughtered (2024); 4.8M t pork; top EU exporter.	Majority in confined gestation + farrowing crates; no national crate ban.	RD306/2020, RD159/2023 (welfare elements, not sow crates); industry IAWS/B+ and Welfair certifications.
	Rabbits	~4M heads; 27M slaughtered; 33k t meat (2024)	Cage-free virtually absent commercially; organic ~2% of farms; conventional wire/plastic-slat cages standard.	No coordinated national financing for cage-free transitions.

4.1.1 Context of the pig sector in Spain and Germany

Spain

As shown in Table 3, Spain is the largest pig producer and exporter in the EU. Commercial farms predominantly rely on confined and semi-confined systems: in

confined systems, sows remain in crates for a period of around two months per pregnancy, while semi-confined systems increase group housing time and reduce the time spent in individual crates⁴³. Group housing where sows are kept in groups at all times exist but remain rare. This housing structure may reflect the sector's strong focus on cost efficiency and international competitiveness, as Spain is the leading EU exporter of pigmeat and pig products.

The annual consumption of pig meat in Spanish households has fluctuated over the past fifteen years between 18 and 23 kg per person, with roughly equal shares of fresh and processed products (cold cuts) (MAPA 2024b). The average annual consumption of fresh pigmeat in 2024 was 9.31 kg, which represents 30% of individually consumed fresh meat (all types included) (MAPA 2024a).

Germany

Although pork production still makes up the largest share of German meat production, accounting for a little less than two-thirds of total meat produced⁴⁴, the pig sector has undergone a marked decrease over the past decade. Both the pig population has shrunk by a quarter, i.e., 7.2 million animals, and the number of farms keeping pigs has declined by 47 percent. This has led to increased concentration and larger farm sizes; in May 2025, farms kept an average of 1,400 pigs each.⁴⁵

This decrease has been even more pronounced in sow farming, which declined by over 30% (BMEL, 2025). This trend may result from the economic pressures faced by the sector over recent years due to outbreaks of African Swine Fever, rising input costs, and volatility in commodity markets⁴⁶.

Despite producing more pork than it consumes, with a self-sufficiency rate of around 135%, Germany imports approximately 942,000 tons annually. At the same time, Germany also exports large quantities of pork, namely around 2.2 million tons in 2024 (Bundesinformation Landwirtschaft, 2025).

While gestation and farrowing crates remain common practice in Germany⁴⁷, the regulatory framework sets out a clear trajectory towards their progressive reduction and eventual elimination (see Table 3). Unlike Spain, policy

⁴³ In these systems, the farrowing crate is closed around the most critical farrowing days, from one or two days before farrowing to three to five days post-farrowing.

⁴⁴ https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/08/PD25_290_413.html

⁴⁵ https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/07/PD25_238_413.html

⁴⁶ <https://www.schweine.net/news/viehzaehlungsergebnisse-schweinebestand-in-deutsch.html>

⁴⁷ <https://animalequality.de/blog/alles-ueber-kastenstaende/>

developments in Germany increasingly place emphasis on compliance with higher animal welfare standards, even where this may be associated with a reduction in domestic production capacity. This suggests that the German pig sector is moving, gradually but explicitly, towards alternative housing systems.

4.1.2 Context of the rabbit sector in Spain and France

France

The production of rabbit meat has been declining in France over recent years, decreasing by 9% compared to 2022 and 23% compared to 2020 (FranceAgriMer, 2025a). Beyond an overall reduction of the number of farms, demographic factors play a role in this trend: 30% of rabbit farmers are expected to retire in the next 10 years (FranceAgriMer, 2025a).

Regarding fattening rabbits, more than 90% of the production is using collective cages (Gidenne et al., 2022, France AgriMer, 2025a). Alternatives to collective cages, including floor pens or elevated pens, account for around 10% of the total production in France, while systems with outdoor access only take up a marginal share (Interview with a research institute).

The average consumption of rabbit meat per inhabitant in France amounted to 0.33 kg in 2023 (CFA, 2024), down from 0.45kg per inhabitant in 2020 (Gidenne et al, 2022). This overall reduction in demand, although less pronounced than the decline in production, contributes to economic pressure on rabbit farmers. In response, producers appear keen on exploring alternative practices to improve visibility and reverse this production trend (Interview with research institute)

France maintains a positive trade balance for rabbit meat both in volume and value. For instance, the trade surplus amounted to of EUR 7.8 million in 2023 (CFA, 2024).

Spain

As shown in Table 3, Spain is the largest producer of rabbit meat in the EU, but with a declining trend: between 2008-2025 rabbit meat production dropped by 45% (MAPA, 2025b). Consumption of rabbit meat is decreasing in Spain, with average per capita consumption at 0.55 kg per year (MAPA, 2024a).

Cage-free systems remain virtually absent in commercial rabbit production (beyond a few organic farms) and most farms continue to use conventional wire cages arranged in rows within enclosed pavilions (Dalmau et al. 2020, Botelho et al. 2020) and with plastic slat flooring (MAPA 2022). In terms of usage, 34% are fattening cages while 23% are nesting cages and 20% can serve both purposes.

While organic production of rabbit meat does not allow the use of cages, this type of production system represents only 2% of all farms (MAPA 2022).

The trade balance of the rabbit sector in Spain has traditionally been positive (MAPA 2025b). Imports are almost negligible (2.6 t) while exports amounted to 6,677 t in 2024. One third of exports are directed to Portugal, while 15% go to Poland (MAPA, 2025b).

4.1.3 Context of the laying hen sector in Germany and Poland

Germany

In 2009 and 2010, the phase-out of conventional cage farming led to a significant decline in the number of laying hens and production volumes in Germany. However, Germany's egg production recovered rapidly and has since stabilised at levels comparable to those observed prior to the transition (Thobe et al, 2021).

Egg consumption has remained relatively stable since 2000, with recent preliminary figures indicating an increase in per capita egg consumption, reaching a new high of 249 eggs per capita in 2024 (Thobe et al, 2021; Federal Office for Agriculture and Food, 2024).

Box 1: Housing systems used in Germany for egg production

- **Barn-based (floor) system:** This is the dominant system in Germany accounting for 58% of eggs produced. Its use has been slowly declining, with its share of total production dropping by five percentage points over the past five years.
- **Free-range system:** The use of this husbandry system has continuously increased over the past years and makes up a share of 23% of egg production in 2024.
- **Organic production:** Organic egg production is also continuing to grow. In 2024, the share of organic eggs produced in Germany was 14.1%. Distinctive features of organic production include mandatory outdoor access, lower stocking density in the barn, and feeding with organic feed.
- **Small group cages:** The use of cages is now only residual in Germany. In 2024, they accounted for 4% of production, and this is likely to fall to zero once national legislation prohibits cage systems after the end of 2025 ⁴⁸.

As domestic production only covers 73% of consumption, Germany is a net importer of eggs, with imports mainly coming from the Netherlands, another

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<https://www.bmel-statistik.de/landwirtschaft/tierhaltung/gefluegelhaltung#:~:text=In%20Deutschland%20haben%202024%202.280,etwa%20die%20H%C3%A4lfte%20aller%20Legehennen>

country relying predominantly on free-range and barn systems. 75% of Germany's total imports, which amounted to 6.1 billion in 2024, were sourced from the Netherlands in 2023. Despite this, Germany, also exports around 2.23 billion eggs per year (Thobe & Koch, 2024).

Poland

Poland is the EU's 5th largest egg producer, with a laying hen population exceeding 50 million heads (CWF, 2025; Eurostat 2024). The use of enriched cages continues to be the prominent housing system for laying hens in Poland, with around two-thirds of the laying hen population in 2023 reared in this system (Otwarte Klatki, 2025), but their use has been gradually declining from around 84% in 2010 to 74% in 2019. The transition to cage-free systems progresses unevenly, progressing more rapidly in smaller-scale and retail-driven farms, while industrial farms largely continue to rely on cage-based systems (GIW, 2023; Otwarte Klatki, 2025), reflecting the lower cost of production associated with enriched cages according to some commentators (Horne et al, 2022).

Per capita consumption has been slowly decreasing, with estimates around 156 eggs per person in 2022, down from over 200 in 2012 (Polish Meat Association Report, 2023). Cage-free products represent between 25% and 30% of the retail market in major supermarket chains, with noticeable growth in organic and free-range categories (The Polish Meat Association Report, 2023), although their purchase price is, on average, higher than that of conventionally produced eggs⁴⁹.

Poland is a significant egg exporter, shipping around 240,000 t annually, mainly to other EU Member States, while continuing to import relatively small quantities to offset supply interruptions (Eurostat, 2024).

4.1.4 Context of calf rearing in France and Poland

France

Calves are born on either farms specialised in dairy or in bovine meat production. In terms of meat production, 516,752 calves were slaughtered for veal production in 2023 (Duflot, 2025), producing 154,000 t of carcass equivalent weight (FranceAgriMer, 2025b). France is the second-highest producer of veal in Europe, behind the Netherlands. At the same time, France is the main producer of bovine

⁴⁹<https://www.farmer.pl/produkcja-zwierzecz/drob-i-jaja/branza-drobiarska-alarmuje-sieci-handlowe-sprzedaja-jaja-ponizej-cen-zakupu,142320.html>

meat in the EU, with 1.2 million t of carcass equivalent weight produced in 2023 (FranceAgriMer, 2025c).

The dairy sector produced 23.3 billion litres of milk in 2023, a number which has been relatively stable since 2000 (CNIEL, 2025), and representing 16.2% of EU total production, the second-highest percentage after Germany⁵⁰. Individual pens for calves are mostly used in the dairy sector; in meat production, suckler calves and those reared in holdings specialised in calves fattening are generally kept with their mothers, or are reared collectively (Pomiès et al, 2023).

In 2024, consumption of bovine meat was 1.43 t of carcass equivalent weight (INTERBEV, 2025), and overall consumption of dairy products reached 8 million t in 2021, corresponding to an average yearly consumption of milk and dairy products per inhabitant of 49kg (CESE, 2024).

In 2024, France exported 238,600 t of carcass equivalent weight of bovine meat, while importing 363,300, resulting in a negative trade balance (INTERBEV, 2025). In contrast, the trade balance for live animals, particularly for calves, was positive with 367,000 calves exported in 2024 (Duflot, 2025), mainly to Spain (FranceAgriMer, 2025, b). For dairy products, the trade balance was positive in 2024 with exports of milk and dairy products exported with a value of EUR 11.3 billion, and imports worth EUR 7.7 billion, resulting in a balance of EUR +3.6 billion (CNIEL, 2025).

Poland

Poland's cattle population exceeded 6.2 million heads in 2024, including around 2.2 million dairy cows, making it one of the leading cattle producers in the EU (Eurostat, 2024; GUS, 2024). Demand for calf-derived products remains high in Poland, supported by a stable consumption and growth within processing industries (Eurostat, 2024; Polish Meat Association, 2023). Consumption trends are influenced by changing dietary preferences with a moderate shift toward higher welfare and organic dairy and veal products. However, economic considerations strongly influence purchasing decisions in this sector, especially in rural areas where more traditional consumption patterns prevail (Polish Meat Association, 2023).

Poland is an active exporter of live calves, veal, and dairy products, with exports mostly destined to neighbouring countries within the EU market (Eurostat, 2024).

⁵⁰ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Milk_and_milk_product_statistics

Imports are relatively limited but play a role in balancing domestic supply, especially in terms of breeding stock (Eurostat, 2024).

4.2 Barriers and enabling factors

Drawing on the annexed country analyses, this section summarises barriers and enablers related to the cage-free transition in the selected Member States, organised around four categories i) the legal and policy framework, ii) costs associated with the transition iii) funding instruments, and iv) demand side measures supporting the transition.

4.2.1 Legal and policy framework

Table 4 provides an overview of the legal and policy framework governing housing conditions for the selected species in the four Member States. The table highlights where national rules go beyond EU minimum requirements and regulatory gaps persist, and how the presence or absence of clear regulatory transition pathways influences the pace of adoption of cage-free systems.

Table 4: Overview of the legal and policy framework in the selected Member States

Member State	Description
Laying hens	
Germany	Key to the phase-out was a national ban on all cage systems for laying hens in 2015, which included a transitional period until the end of 2025 ⁵¹ . Earlier commitment from retailers, previous Länder-level cage bans and judicial decisions⁵² were key drivers for adoption of the national ban. Conventional cages were already prohibited in 2006, and several Länder had already adopted a ban before the country-wide ban of all cage systems in 2015. Moreover, several rulings of the Federal Constitutional Court which e.g. considered certain laws regulating the use of cages as incompatible with the constitution, resulted in an improvement of the housing conditions of laying hens prior to the ban.
Poland	There are currently no national bans or timelines for phasing out cage-based systems, and enriched cages dominate production. The continued reliance on EU minimum standards acts as a barrier , since the absence of a national timeline or prohibition creates no regulatory pressure or investment certainty for farmers to move away from enriched cages.

⁵¹ <https://albertschweitzerfoundation.org/news/germanys-path-to-ending-cages-for-hens>

⁵² Federal Constitutional Court (Germany), judgment of 6 July 1999, 2 BvF 3/90, BVerfGE 101, 1 and Federal Constitutional Court (Germany), Decision of the Second Senate of 12 October 2010, 2 BvF 1/07, BVerfGE 127, 293.
https://www.bundesverfassungsgericht.de/SharedDocs/Entscheidungen/DE/2010/10/fs20101012_2bvf000107.html
https://www.bundesverfassungsgericht.de/SharedDocs/Entscheidungen/DE/1999/07/fs19990706_2bvf000390.html

Member State	Description
Pigs	
Germany	The phasing out of farrowing and gestation crates was introduced via a new legislation in 2021 ⁵³ . This legislation is already applicable to newly built farms, while for existing ones, there is a transition period. The legislation setting a long transition period functions as an enabler, as it provides clarity and predictability for investment while progressively restricting confinement.
Spain	Currently, there is no specific legislation in Spain prohibiting the use of farrowing and gestation crates, as the Spanish regulation allows sows to be isolated for the first four weeks following insemination, and one week before farrowing. The text refers to the sows being “isolated” but still able to “easily turn around”. Spain’s regulatory framework is a barrier, as the absence of restrictions on crates and the definition of “isolation” allow existing systems to continue without incentives for structural change.
Rabbits	
France	Beyond the EU Directive for the protection of animals kept for farming purposes, adopted in 1998 ⁵⁴ , there is no specific legislation for the rabbit sector, neither at the national nor at the European level. The uncertainty about the future legislation applicable to rabbit farming represents a barrier to investment towards alternative rearing methods.
Spain	For conventional farms and integrated farms, there is an obligation to provide rabbits with the amount of space needed for their physiological needs, but specifications on what this means in practice are lacking. Technical requirements for rabbit production in “integrated” farms are provided by each Autonomous Community separately. Hence, fragmented regional rules and lack of welfare-specific provisions act as a barrier, since they create inconsistent standards and no clear policy signal to support group housing or cage-free adoption.
Calves	
France	Calves can be reared in individual pens in France for the first eight weeks of their life, as laid down in Directive 2008/119/EC , transposed in France, possibly acting as a barrier to the move towards group housing by locking in these minimum standards . However, since a wide range of collective-rearing practices currently spreads through peer networks in the absence of detailed regulation, a new standardised EU rule could unintentionally reduce this diversity and slow the uptake of more innovative practices.
Poland	In Poland, there is no national ban or planned phase-out for individual pens for calves. Poland also relies on the minimum requirements laid down in Directive 2008/119/EC (see above).

Across the four Member states, **only Germany has adopted national legislation going beyond EU minimum requirements and sets clear timelines** to improve

⁵³ <https://www.gesetze-im-internet.de/tierschnutztv/BJNR275800001.html>

⁵⁴ COUNCIL DIRECTIVE 98/58/EC of 20 July 1998 concerning the protection of animals kept for farming purposes, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:31998L0058>

housing conditions and reduce the confinement for the species examined (laying hens and pigs). By contrast, France, Spain, and Poland continue to rely on the EU regulatory framework for the housing conditions of the species investigated in these Member States.

The adoption of stricter national legislation by Germany followed **earlier commitments by retailers, legislation passed in several federal states and judicial rulings**, which **created enabling market conditions and political momentum** for the nation ban of all cage systems for laying hens by 2025⁵⁵.

By contrast, in the three other Member States, **solely relying on EU legislation creates a lock-in effect**, and fails to incentivise farmers to shift to alternative systems. Hence, the **planned revision of the EU animal welfare legislation** represents a key opportunity to **establish clear standards, define transition times and provide long-term regulatory certainty for farmers**. At present, however, the uncertainty surrounding the final content and timelines of the upcoming EU reforms, makes farmers hesitant to invest in new housing systems that may become obsolete in the near future (interview with stakeholders). This underscores the importance of **adopting the revised legislation swiftly**, so that farmers gain the visibility they need to plan and commit to long-term investments without risking technological or regulatory obsolescence.

4.2.2 The costs associated with the transition

Table 5 provides an overview of the costs associated with the transition to cage-free systems for the species investigated in the four Member States. The table highlights where available cost estimates indicate that investments and (temporary) production decreases may be dissuasive, and where reduced labour needs or other operational savings may offset these costs and thereby act as an enabler of the transition.

Table 5: Overview of the costs associated with the transition in the selected Member States

Member State	Description
Laying hens	
Germany	The move to cage-free systems has already involved significant structural investments, averaging an estimated EUR 30-35 per hen place between 2009 and the end of 2013. This means costs are now relatively well-understood and predictable, thereby enabling further conversion .

⁵⁵ <https://albertschweitzerfoundation.org/news/germanys-path-to-ending-cages-for-hens>

Member State	Description
Poland	Switching to alternative rearing systems for laying hens could lead to additional operating costs, as well as lower productivity, at least in the short-term , which together act as barriers to investment and slow the transition.
Pigs	
Germany	The availability of government assessments of the structural investment needs (EUR 880 per sow) and operational costs associated with non-confined systems in pig farming enables planning for both farmers and administrations . However, additional operating costs , estimated to range between EUR 421 and EUR 537 per sow may act as a barrier to uptake .
Spain	The available evidence points to high investment needs, variable adaptation costs, potential price impacts, and temporary productivity losses , which together make the Spanish cost context a major barrier to a cage-free transition for pigs. The pig industry estimates that removing crates could cost the sector 1.5-1.7 billion EUR in investments ⁵⁶ , with typical farm-level costs of around EUR 300k per farm where livestock densities are reduced, or EUR 500k if level of production is maintained ⁵⁷ ; stakeholders anticipate a 20% price increase for consumers ⁵⁸ . Adaptation costs vary with the level of the modification: EUR 50–300 per sow for retrofits, EUR 150–350 per new gestational place, and EUR 430–723 per sow for new facilities. In terms of productivity, there is documented risk of lower efficiency during the transition period with reduced farrowing rates.
Rabbits	
France	High and system dependent investment needs constitute a major barrier to transition, as they raise upfront costs and financial risks for farmers . It is estimated that the conversion of an existing building to cage-free farming would, on average, cost EUR 232 per rabbit, while constructing a new building for fattening would average EUR 511 per rabbit, and a combined building for breeding and fattening EUR 812 per rabbit. At national level, a full conversion of all rabbit fattening farms to cage-free farming is estimated at EUR 112 - EUR 132 million, of which around EUR 90 million reflecting direct conversion costs, and the remainder attributed to lower production levels during transition. -dependent investment needs constitute a major barrier
Spain	There are no published costs for the removal of rabbit cages in Spanish farms. Costs would depend on changes in the productivity of does and mortality rates. The absence of cost estimates represents a barrier, as farmers and authorities cost information and financial clarity needed to plan or justify investments in cage-free systems.

⁵⁶ https://www.segre.com/es/economia/231116/eliminar-jaulas-tiene-un-coste-de-220-millones-para-el-porcino-de-lleida_250066.html

⁵⁷ <https://efeagro.com/granja-porcino-bienestar-animal/>

⁵⁸ <https://www.europapress.es/epagro/noticia-ganaderia-ganaderos-estiman-normativa-acabar-jaulas-encarecera-20-huevos-hara-inviable-porcino-20210611144925.html>

Member State	Description
Calves	
France	Some alternatives to individual pens might reduce labour demand, since inspection, feeding and cleaning typically require less time in collective housing systems. Allowing calves to suckle their mother might lower labour demand. Therefore, this aspect could incentivise the adoption of alternative practices among farmers. However, upfront investments may still be needed to adapt buildings which can be dissuasive for farmers. In general, the use of nurse cows for the rearing of calves may result in lower volumes of milk available for sale, through this might be offset by a decrease in veterinary costs due to improved calf and cow health. Overall, while labour savings act as an enabler, investment needs and potential revenue effects represent barriers.
Poland	The transition from individual pens to group housing often requires structural investment on farm, for instance, to adopt a new barn, improve ventilation and purchase new feeding systems (A potential effect on cost can result from the initial increase in risk of enteric and respiratory disease, potentially associated with collective housing, which requires careful management).

As highlighted in the annex, the costs associated with transitioning to cage-free systems vary considerably across species and Member States. Two types of cost can be distinguished: costs for structural investments, such as new buildings or retrofits, and changes in running costs, which can include shifts in labour needs, feed use, energy consumption, or veterinary costs.

Structural investments are often the most significant financial hurdle, particularly where farmers must redesign or expand facilities since moving to an alternative is not always a simple case of removing cages. In the case of laying hens, enriched cages may be replaced by a remodelled facility or a completely new barn. Such investments can in principle, be supported by targeted funding schemes, but where they are absent or insufficient, upfront costs remain prohibitive. Running costs, by contrast, can increase, for instance through higher labour, energy and feeding requirements, or they might decrease due to labour savings or lower veterinary costs, as in better welfare systems, animals tend to be healthier⁵⁹.

A common challenge across species is the **difficulty to estimate the costs associated with the transition**. In some sectors, such as pigs in Germany, government and industry estimates vary considerably, complicating planning. In Spain, estimates of investment needs for phasing out farrowing crates also vary widely, mainly due to different possible transition pathways (i.e. reduction of the herd size, extending existing buildings or constructing entirely new facilities).

⁵⁹ <https://www.ciwf.org.uk/media/3818614/reviewing-the-costs.pdf>

Minimum space requirements, which could be defined by future legislation, would increase costs further. For rabbits in Spain, the absence of any cost data creates additional uncertainty, slowing investment decisions. Even in sectors where transitions have already taken place, such as for the laying hen sector in Germany, retrospective assessments demonstrate the complexity of duly assessing investment needs.

Running costs related to the transition are similarly species-dependent. For certain species, the cage-free practices might generate additional costs or lead to a loss of productivity. This is expected for the laying hen sector in Poland, as alternative rearing systems could lead to an increase in operating costs, as well as lower productivity, as the egg production per hen might decrease in the short term. Transitioning away from farrowing crates in pig farming may also incur additional costs, highlighting the **importance of transition periods** that allow farmers to test and adjust management practices and reduce operational inefficiencies over time. Conversely, in the case of calves, insights from France and Poland suggest that collective housing may not significantly increase running costs and could even reduce labour demand⁶⁰.

4.2.3 Funding instruments

Table 6 describes existing funding schemes offered by the four covered Member States to support farmers in the transition to cage-free systems.

Table 6: Overview of the funding instruments in the selected Member States

Member State	Description
Laying hens	
Germany	A key enabler of the transition towards cage-free systems for laying hens in Germany was the adoption of the 'Federal Program for the Promotion of Animal-Welfare-Compatible Husbandry Methods' ("Bundesprogramm zur Förderung tiergerechter Haltungsverfahren"), which ran between 2002 and 2006. Over its entire duration, low-interest loans amounting to approximately EUR 19 million were approved, resulting in the creation of about 1.3 million new laying-hen places ⁶¹ . This programme was complemented by the adoption in many Länder, e.g., Lower Saxony, North Rhine-Westphalia, Bavaria, and Baden-Württemberg, of additional programmes for barn conversions, offering investment grants and interest subsidies ⁶² .

⁶⁰ https://idele.fr/colocavo/publications/detail?tx_atolidelecontenus_publicationdetail%5Baction%5D=showArticle&tx_atolidelecontenus_publicationdetail%5Bcontroller%5D=Detail&tx_atolidelecontenus_publicationdetail%5Bpublication%5D=22825&cHash=710d87aa84181af92323af189d2192c9

⁶¹ https://dserver.bundestag.de/btd/16/050/1605044.pdf?utm_

⁶² https://www.provieh.de/wp-content/uploads/2021/01/Rundbried_03_2002.pdf?utm_

Member State	Description
Poland	A potential enabler of the transition towards cage-free farming for laying hens in Poland could be an eco-scheme ('I 4.6') offered under the national CAP Strategic Plan. It has substantial budget, and offers farmers financial support for several practices, including the use of cage-free systems for laying hens and the reduction of the confinement of sows. However, as payments might also benefit farms that have already transitioned, it is unclear to what extent it facilitates conversion to cage-free rearing .
Pigs	
Germany	Germany adopted in 2024 a programme focusing on the improvement of housing conditions in the pig sector , including the use of gestation and farrowing crates for sows ⁶³ . The programme supports both the structural investments needed to adopt better housing practices, and the additional costs associated with these new practices. It coincides with the planned phasing out of farrowing crates, which will be prohibited as of 2035. Given the significant costs associated with this transition, the adoption of this scheme is highly valuable for facilitating the change to alternative systems .
Spain	The CAP support scheme '6504' adopted by Spain requires a reduction in the confinement period for sows. The intervention allows Autonomous Communities to compensate pig farmers for the costs and income forgone when committing to 'open' farrowing systems (which allow sows to be caged only for the first week after birth). However, only two Autonomous Communities, the Balearic Islands and Castile and León, have programmed this measure , providing support of 51 EUR/LSU. Within the CAP Strategic Plan, the investment measure '6841.1' may also support on-farm investments that contribute to improved animal welfare, though it does not specifically target cage-free systems. Given the significant costs associated with the phasing out farrowing and gestation crates, the absence of broader or more targeted support presents a potential barrier to the implementation of the transition .
Rabbits	
France	France supports rabbit producer organisations through sectoral measures in its CAP Strategic Plan. These measures finance operational programmes in the rabbit sector , which pursue several objectives, including improving production and distribution, and explicitly highlights the need to support farmers in transitioning towards new methods of production, including cage-free systems. In addition, support for organic farming through the CAP Strategic Plan may also encourage the uptake of alternative rearing practices in rabbit farming. However, considering the size of the sector, more targeted funding instruments could play a significant role in phasing out of cage farming for fattening rabbits .
Spain	Part of the rabbit sector in Spain receives CAP support via investment measure '6841.1', which can finance on-farm investments that contribute to improved animal welfare. However, the transition towards cage-free farming for rabbits

⁶³ The name of the programme is 'Bundesprogramm zum Umbau der landwirtschaftlichen Tierhaltung' (Federal programme for the conversion of livestock farming). <https://www.bmleh.de/SharedDocs/Archiv/Meldungen/2024/240314-bundesprogramm-umbau-tierhaltung.html>

Member State	Description
	would require more targeted funding instruments to effectively support farmers in making the shift.
Calves	
France	Alternative housing practices for calves may be supported through measures dedicated to organic farming , which are offered by France's CAP Strategic Plan. The plan may also finance structural investment related to calf housing through its investment schemes . However, despite existence of schemes specifically for calves (e.g. coupled income support), there is no scheme explicitly targeting the promotion of collective housing for calves. Overall, the potential to support collective housing for calves remains largely underutilised at national level, while public funds are still being used to finance the creation of individual pens for calves ⁶⁴ .
Poland	Calf welfare improvements can be supported through the Dobrostan Zwierząt scheme, which covers cattle and provides annual payments for meeting higher welfare standards. The KPO "Rolnictwo 4.0" program also offers funding for modernisation and automation, such as precision feeding systems or environmental sensors, that can indirectly support group-housing systems. In addition, Poland's CAP Strategic Plan may support the adoption of collective housing practices for calves through its investment and eco-schemes. However, the overall support for alternative practices in calves rearing remains mostly indirect, and could be better targeted by funding instruments , as existing funding instruments, such as the mentioned CAP schemes do not explicitly prioritise collective housing.

Across the four Member States, there is a **clear relationship between the availability of dedicated funding** instruments and the progress made towards cage-free systems. **Germany stands out** as the only country with a substantial national programme specifically designed to support conversion, both historically in the laying-hen sector and more recently in the pig sector. These schemes provide **targeted investment support** and help offset **additional operating costs**, making them strong **enablers** of the transition.

By contrast, **Poland, France and Spain, rely predominantly on the CAP Strategic Plans**⁶⁵ and broader programmes, such as **organic farming support**, which may contribute indirectly to improvements in housing conditions but do not prioritise cage-free systems. In addition, payments can also be claimed by

⁶⁴ https://les-aides.fr/aide/VQk_3w/region-grand-est.aide-aux-investissements-d-adaptation-des-elevages-preparer-l-avenir.pdf

⁶⁵ The CAP support schemes mentioned in this section were analysed through the CAP Strategic Plans of the selected Member States and the Catalogue of CAP interventions (https://agridata.ec.europa.eu/extensions/DashboardCapPlan/catalogue_interventions.html?page=ByUnitAmount)

farms that have already transitioned, which **reduces their conversion effect**. In several cases, support is available only in specific regions or depends heavily on how regions choose to implement national CAP measures, resulting in **patchy and uneven access** to funding.

A second cross-cutting barrier is the lack of species-specific financial instruments. In sectors with high structural investment needs, such as pigs and rabbits, general investment schemes fail to lower the cost of transition, as they do not address the unique requirements of alternative housing systems. Conversely, where support is more explicitly linked to transition objectives, such as Germany's pig programme or certain French sectoral measures, the incentives are clearer and farmers gain more certainty over the financial feasibility of conversion.

Finally, the analysis highlights that **funding instruments tend to maintain existing practices unless they are explicitly designed to drive structural change**. Programmes focused on organic farming or general welfare improvements can contribute indirectly but are unlikely to drive large-scale transition on their own. The potential of national funding instruments, including the CAP Strategic Plan schemes, could be better exploited with more targeted and species-specific support. The experience in the laying-hen sector in Germany shows that, **when linked to regulatory timelines, such targeted funding instruments are a key enabler for the transition to alternative rearing systems**.

4.2.4 Demand side measures

Table 7 summarises the demand-side measures influencing the transition to cage-free systems in the four Member States. These instruments, primarily labelling schemes, retailer commitments and, to a lesser extent, public procurement, signal welfare standards to consumers and buyers. They tend to act as enablers when they provide clear, widely recognised information on production systems and create stable demand for higher-welfare products. Conversely, when they are voluntary, limited in scope, or fail to reflect relevant housing practices, their impact remains weak and may even function as a barrier by offering little incentive for farmers to change established systems.

Table 7: Overview of the demand side measures in the selected Member States

Member State	Description
Laying hens	
Germany	Labels indicating the husbandry system used to produce eggs were introduced in the early 2000s ⁶⁶ , and by 2001, most retailers had already delisted caged eggs ⁶⁷ . These retail commitments and clear labelling practices functioned as strong enablers of the transition. However, the absence of mandatory label requirement for processed products containing eggs remains a barrier , as it limits transparency along the value chain.
Poland	Despite the absence of legislation, more than 140 companies, including important retailers, pledged to end cage-egg sales by 2025, providing an important market-driven enabler of the transition .
Pigs	
Germany	There are currently no demand-side measures that contribute to the phasing out of farrowing and gestation crates in Germany. Although pig products will have to comply with the mandatory label "Tierhaltungskennzeichen", it does not cover insemination and farrowing phases ⁶⁸ , and therefore does not act as an enabler of this specific transition .
Spain	Labelling schemes for pigs in Spain are mostly private (IAWS/B+) ⁶⁹ or research-based (Welfair Certificate) ⁷⁰ . Some higher-tier categories under the IAWS/B+ scheme require group housing during gestation as well as farrowing, which can act as a partial enabler, but lower tiers largely mirror legal requirements. The "Welfair Certificate" does not prohibit the use of a confinement systems. Overall, the predominance of voluntary labels with limited scope operates more as a weak or inconsistent enabler .
Rabbits	

⁶⁶ <https://www.verbraucherzentrale.de/wissen/lebensmittel/lebensmittelproduktion/eier-aus-kaefighaltung-versteckt-in-lebensmitteln-45611>

⁶⁷ <https://albertschweitzerfoundation.org/news/germanys-path-to-ending-cages-for-hens>

⁶⁸ https://www.bml.de/DE/themen/tiere/tierschutz/tierhaltungskennzeichnung/tierhaltungskennzeichnung_node.html

⁶⁹ Technical guidelines can be found here: https://s6f531706a66c47d2.jimcontent.com/download/version/1701352342/module/14775656729/name/Anexo_1A-Reglamento_T%C3%A9cnico_IAWS_GeneralidadesPorcino_Rev_8.pdf

⁷⁰ <https://animalwelfair.com/en/>

Member State	Description
France	Current demand for organic rabbit meat exceeds supply creating opportunities for farmers. The initiative “Lapin & Bien” , which was created by several rabbit producers, requires rabbits to be reared in collective pens ⁷¹ and serves as an enabler by helping valorise higher-welfare products and could incentivise more farmers to adopt alternative rearing practices, opening the door for wider labelling schemes.
Spain	The rabbit professional sector association, INTERCUN, has its own animal welfare commitment (B+) ⁷² - BACI. It sets minimum housing conditions and provides a benchmark which can act as an enabler. The ‘Welfair’ certification, also applicable to rabbit farming (see above), scores several elements related to housing conditions, and the use of cages lowers welfare scores, creating an incentive to improve systems. Nonetheless, neither of these voluntary schemes mandates cage-free systems, meaning their overall effect remains a weak enabler rather than a significant contributor to driving the transition.
Calves	
France	Several labelling schemes might have an effect on the housing condition of calves. Although not specific to France, the organic farming label , which prohibits the use of individual pens for calves after one week, clearly acts as an enabler . However, despite certain labelling schemes related to geographic indications that require the collective housing of calves (e.g. Veau d’Aveyron et du Ségala), the main labels for meat production, such as “Label Rouge”, do not restrict individual pens , which limits the demand-side pull and constitutes a barrier to wider uptake.
Poland	Calf-derived products lack mandatory welfare labelling , and existing retailer or processor commitments are limited and inconsistent . As a result, farmers transitioning to group housing receive little market reward, which acts as a clear barrier . Public procurement occasionally includes animal welfare measures, proving only a marginal enabling effect.

Across the Member States examined, demand-side measures vary considerably in strength and coverage. The **laying-hen sector seems to be the most “advanced” sector in terms of demand-side measures**, with Germany’s early adoption of husbandry labels in the early 2000s⁷³ and retailer delisting of caged eggs in 2001, acting as enablers⁷⁴. Similarly, in Poland, extensive corporate commitments, including from leading retailers, to end cage-egg sales by 2025 send a strong market signal. However, in both countries, there are currently no

⁷¹ <https://lapinetbien.com/histoire/>

⁷² The internal regulation can be found here: <https://intercun.org/wp-content/uploads/2025/01/Reglamento-Tecnico-BIENESTAR-ANIMAL-BACI.pdf>

⁷³ <https://www.verbraucherzentrale.de/wissen/lebensmittel/lebensmittelproduktion/eier-aus-kaefighaltung-versteckt-in-lebensmitteln-45611>

⁷⁴ <https://albertschweitzerfoundation.org/news/germanys-path-to-ending-cages-for-hens>

mandatory labelling requirements for processed products containing eggs, which limits the overall impact of the existing measures.

For pigs, demand-side measures are considerably weaker. In Germany, pig products will have to comply with the mandatory label “Tierhaltungskennzeichen”, but it does not cover the insemination and farrowing phases⁷⁵, providing no leverage for crate phase-out. Existing labelling schemes for pigs in Spain are mostly private, voluntary schemes The IAWS/B+⁷⁶ Welfair certification⁷⁷ generate only limited pressure for change, as they do not mandate crate-free systems and mirror legal requirements in their lower tiers.

In the rabbit sector in France and Spain, demand-side measures come mostly from the industry, instead of national labelling schemes. In France, strong consumer interest in organic products and initiatives such as *Lapin & Bien*, which require collective pens, help **valorise higher welfare systems**. In Spain, INTERCUN’s B+ commitment and the Welfair scheme offer benchmarks that may encourage incremental improvements, but the lack of compulsory cage-free requirements means their effect on the housing conditions of animals remains limited.

For calves, existing labelling schemes in the covered Member States do not require specific housing practices for animals. This is the case for the main labels related to veal meat in France and Poland, even though, under certain geographical indications, collective housing for the calves can be required in France⁷⁸.

⁷⁵ https://www.bmleh.de/DE/themen/tiere/tierschutz/tierhaltungskennzeichnung/tierhaltungskennzeichnung_node.html

⁷⁶ Technical guidelines can be found here: [https://s6f531706a66c47d2.jimcontent.com/download/version/1701352342/module/14775656729/name/Anexo 1A-Reglamento T%C3%A9cnico IAWS GeneralidadesPorcino. Rev 8.pdf](https://s6f531706a66c47d2.jimcontent.com/download/version/1701352342/module/14775656729/name/Anexo%201A-Reglamento%20T%C3%A9cnico%20IAWS%20Generalidades%20Porcino.%20Rev%208.pdf)

⁷⁷ <https://animalwelfair.com/en/>

⁷⁸ Cahier des charges de l’indication géographique protégée « Veau d’Aveyron et du Ségala » homologué par arrêté du 4 août 2025 publié au JORF n°0181 du 6 août 2025 Bulletin officiel du Ministère de l’Agriculture et de la souveraineté alimentaire n°2025-32 https://info.agriculture.gouv.fr/boagri/document_administratif-4b074368-a451-44aa-bea8-ae54497059b5/telechargement

Beyond these species-specific labels, organic labelling schemes can also play a role in animal welfare, as organic products must comply with the EU regulation, which contains requirements associated with the housing conditions of animals⁷⁹.

⁷⁹ REGULATION (EU) 2018/848 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R0848>

5. KEY LEARNINGS AND RECOMMENDATIONS

This section summarises the main insights from the evidence review and the Member State analyses (Germany, France, Spain, Poland), drawing out the factors that most influence progress towards cage-free systems. Findings highlight that legislative certainty, clear timelines, species-specific transition plans and availability of upfront investment support are important but not sufficient. The transition depends equally on targeted CAP support that prioritises conversion over maintenance, and on robust demand-side measures that help absorb higher upfront costs and sustain market pull.

These enabling conditions sit within a much broader transformation of Europe's livestock sector that is shaped by drivers beyond the need for animal-welfare improvements: consumption patterns are changing, increasing climate risks require agricultural production to adapt, the sector is facing labour shortages, farm consolidation, and demographic change. For instance, as older farmers retire and herds decline in some regions, these structural shifts can create opportunities to move towards higher-welfare systems without expanding overall production capacity.

These shifts might have implications for livestock numbers, land use and market organisation. When well sequenced, it can support protein diversification, align production with climate and environmental targets, and improve food-system resilience. On the flipside, if poorly managed, it risks accelerating the exit of smaller producers or widening regional disparities. Time-bound, well-designed support helps maintain resilience and public acceptance (Urios et al, 2022).

5.1 Policy certainty and timelines shape investment decisions

A common finding between Member States is the importance of a stable legislative framework. The current legislation, widely regarded as outdated⁸⁰, presents a barrier to the phasing out of cage farming. Without updated rules, farmers lack clarity about future requirements, which discourages them from adopting alternative rearing practices. Farmers are therefore likely to be reluctant to make substantial, long-term investments because they cannot anticipate whether these systems will remain compliant in the future.

⁸⁰ Many provisions of the current legislation framework are considered as outdated by EFSA's panel on animal welfare, for instance, in the recommendations for the welfare of pigs, laying hens, calves, dairy cows and broiler chickens.

https://www.efsa.europa.eu/en/search?f%5B0%5D=topic%3A363&type%5Bplain_language_summary%5D=plain_language_summary&topic%5B363%5D=363&page=0

As the evidence presented in Section 2 highlights, **legislative certainty with clear transition deadlines is the primary driver of investment readiness**. The Member State analyses carried out within the context of this study confirm this conclusion: Germany's phased approach, which included a ban on all cage systems for laying hens adopted in 2015 with a transition to end-2025, and 2021 reforms that limit farrowing-crate confinement to five days by 2036, has reduced resistance and investment risk. By contrast, in Spain's pig and rabbit sectors, where no statutory endpoint exists, and finance is limited, incremental measures have tended to stabilise existing systems. Poland's egg sector shows that widespread corporate pledges help but are insufficient without a statutory trajectory and targeted finance

Transition costs could potentially be mitigated thanks to the adoption of a transition period. Such a period allows farmers to adapt gradually, learn new management practices, and minimise the short-term disruption associated with structural changes. During this adjustment phase, farmers can acquire the skills needed to manage collective housing systems effectively, helping to mitigate potential temporary challenges, such as health or behavioural issues, that may arise when animals adapt to new environments.

Recommendations

The revision of EU legislation on animal welfare represents a critical milestone for enabling a coherent transition to cage-free systems. At present, uncertainty about the final content and timelines of the forthcoming reforms makes many farmers hesitant to invest in housing systems that could soon become obsolete.

- **The swift adoption of the legislation** is crucial to provide the visibility producers need to plan and commit to long-term investments without risking technological or regulatory obsolescence.
- **The legislation should set out clear species-specific transition periods and be accompanied by implementation guidance based on the latest scientific and technical advice** from the European Food Safety Authority and the EU's Reference Centres for Animal Welfare, so that producers can make informed investment decisions as early as possible.

5.2 The transition towards cage-free systems differs substantially across species

Transition costs and pathways towards cage-free systems vary considerably across species and production contexts. While some common elements can be identified, the evidence clearly shows that there is not ‘one transition’; transition challenges, financing needs, legislative requirements, animal health considerations and demand-side dynamics differ considerably between sectors. Hence, both the costs and the policy approaches required to support the transition are highly context dependent.

Costs and performance vary significantly by species. The literature suggests that conversion in the laying-hen sector typically requires structural investment and can lead to higher running costs. However, learning effects (better design, flock management, hygiene) narrow performance gaps over time. For pigs, the literature indicates that well-designed temporary or zero-confinement farrowing systems can achieve performance comparable to continuous crating after a learning curve, with estimated production cost increases of roughly 2–4% depending on design and management. By contrast, for calves, although structural investments may be needed for remodelling of facilities, the operational costs of collective housing tend to be similar to those of individual pens. For rabbits, alternatives, especially those for breeding does, often require further technical optimisation before they can be deployed at scale.

Beyond these species-specific differences, other factors influence transition costs more broadly, such as farm size, location, production type and the specific alternative chosen (e.g. aviaries, barn or outdoor rearing systems for laying hens). For the same reason, estimating these costs beforehand is equally challenging. But this is not only due to the range of factors shaping costs, but also external drivers, notably the extent to which market actors absorb or react to higher production costs and how supply-chain stakeholders adjust their purchasing, pricing, and sourcing practices.

These differences are especially visible in **the technical maturity and availability of alternatives**, i.e. how developed and well-tested cage-free systems are. Hen systems (aviary, barn, free-range) are already mature and widely used, whereas group housing for breeding-doe rabbits still requires protocol development and optimisation. In addition, housing changes affect welfare and may affect performance, such as in loose farrowing or group-housed does. However, evidence shows that effective design, management and training can mitigate these effects over time. In conclusion, **the availability of proven alternatives** differs substantially across sectors.

Training and knowledge exchange can substantially reduce costs by assisting farmers in effectively designing and managing cage-free farming from the outset. As the reviewed literature in Section 2 suggests, the quality of the design and implementation of cage-free systems, including pen or house design, biosecurity and hygiene measures, and staff skills, drives outcomes far more than the simple distinction between cage-free and caged systems. Considering the importance of design and management quality, Member States play a key role in facilitating knowledge exchange. They could **establish species-specific “conversion packages” under AKIS⁸¹, drawing from EURCAW materials**, that combine **pre-investment design support** (housing layout, stocking, ventilation, enrichment), and **staff training** (e.g. on biosecurity measures and flock/herd monitoring).

The evidence reviewed points to several elements which should be prioritised in the transition plans for the species covered by this study:

- **Laying hens:** Because non-cage systems for hens are already technically mature and widely available, Member States can focus on scaling proven alternatives, namely free-range, barn and aviary systems, supported by strong advisory services, a clear legal framework and investment aid. As experience accumulates, performance gaps narrow and transition risks fall.
- **Pigs:** A successful transition away from permanent crating requires progressive limits on confinement, clear pen-design standards, and close monitoring of outcomes during the learning phase. Well-designed alternatives to farrowing and gestation crates can approach the performance of conventional practices, typically with modest cost increases that diminish as management improves. A key challenge is the substantial structural investment needed to convert to cage-free practices in the sector; support schemes supporting upfront costs are therefore a crucial part of any transition plan for the pig sector.
- **Calves:** Early group housing can be mainstreamed with technical standards, limited structural adaptations and advisory support. Member State pilots show this pathway is feasible and largely organisational rather than capital-intensive when implemented with clear guidance.
- **Rabbits:** Before large-scale conversion, the sector, particularly for breeding does, needs additional research, pilot testing and protocol development to

⁸¹ The acronym AKIS stands for “Agricultural Knowledge and Innovation Systems”. It is described within article 114 of EU regulation 2021/2115 as “the combined organisation and knowledge flows between individuals, organisations, and institutions who use and produce knowledge for agriculture and interrelated fields”

stabilise performance and management routines. In the meantime, targeted pilots and knowledge-exchange should focus on refining designs and husbandry to reduce risks.

Overall, the evidence suggests that EU and national authorities should develop species-specific transition roadmaps with clear endpoints, sequenced milestones, standardised design specifications and financial instruments paired with advisory and mentorship support. Member States have a central role in operationalising these frameworks. **The adoption of species-specific transition plans** aligned with EU timelines, including clear milestones, budget envelopes, and advisory capacity **is a key enabler of the transition**. To leverage the conversion of farms, and, where necessary, the exit of certain producers from the sector, Member States should provide adequate financial support, whether through state-aid, CAP subsidies, targeted taxation or improved access to related to loans.

Recommendations

The evidence reviewed shows that the transition to cage-free systems will involve **different costs, timelines and technical challenges across species and production contexts**. In many sectors, structural investments and management changes will be required, while the availability and maturity of alternatives vary considerably. Public support and policy frameworks therefore need to be **carefully designed and species-specific**, combining financial assistance with advisory and training support to reduce transition risks and ensure that investments lead to effective and durable welfare improvements.

- **Financial support schemes should be grounded in evidence-based impact assessments** that take into account species-specific transition costs, farm characteristics and the maturity of available alternatives.
- **Assessments should consider both structural investment needs and operational changes**, as well as expected learning effects and supply-chain responses that may influence long-term costs.
- **Member States should establish species-specific transition plans, including financing and training**. Plans should be aligned with EU timelines, including clear milestones, financing instruments and advisory capacity. They should combine investment aid for

structural conversion, advisory services and training, and knowledge-exchange platforms under AKIS.

- **Species-specific “conversion packages”** integrating pre-investment design support, technical standards and staff training can help farmers implement cage-free systems effectively from the outset and reduce transition risks.

5.3 Upfront investment remains a key constraint

The transition period is often reflected in short-term productivity changes as Member States phase out cage farming. In several examples cited in this report, such as the shift away from conventional cages in the laying hen sector in Germany, and the phase-out of farrowing crates in Sweden, **productivity returned to pre-transition levels after a slight decline in the first years.** Despite the difficulties in assessing the full costs of transitioning, the phasing out of cage farming could benefit from more targeted funding instruments, which could notably compensate for high-cost, one-off investments, and not only provide recurrent annual payments. These investments, which concern transformative changes on the farm, such as retrofitting barns for loose farrowing or the purchase of new housing facilities, remain an important barrier for farmers to implement the transition towards cage-free systems. However, as shown in Section 3’s CAP analysis, most Member State animal welfare interventions reward farmers who already comply with higher standards, rather than those who need to make large, upfront changes to housing or management.

Across species and countries, **access to capital for conversion, including buildings, retrofits and land reconfiguration, remains the binding constraint.** Germany’s Umbau der Tierhaltung programme combines investment support with limited ongoing-cost payments and has increased farmers’ willingness to convert, although its complexity and relatively short programme windows restrict access for some producers. In Poland and France, more fragmented investment aid slows structural change, even in the face of strong retail demand for cage-free eggs and promising pilots on calf housing.

Further, the EU should provide clearer guidance on how transitional support can be granted under State Aid rules without breaching the principle that aid cannot compensate for compliance with mandatory requirements. Under current rules, support can only be provided for commitments that go beyond legal

minimum standards. Such clarification would enable Member States to design targeted schemes for structural investments and temporary income foregone throughout the transition phase, while remaining compliant with EU competition law.

Finally, the **European Investment Bank's €3 billion agriculture and bioeconomy facility offers an opportunity to mobilise long-term finance for housing conversions**. By combining EIB lending with other public instruments, such as CAP grants or national guarantees, these facilities could help reduce the cost of capital for farmers undertaking major structural changes. Early implementation of the facility suggests that several of its priorities are already being operationalised through national agreements with financial intermediaries, but there is currently no evidence that these agreements explicitly support investments related to cage-free transitions or broader animal welfare improvements. This indicates that the facility has **untapped potential to support the transition towards higher welfare farming systems**.

Recommendations

High upfront investment costs remain one of the main barriers to the transition towards cage-free systems. While productivity impacts during the transition period are often temporary, farmers must finance substantial structural changes to housing and farm infrastructure. **Public support therefore needs to focus more strongly on facilitating capital investment and improving access to finance.**

- **Member States should combine CAP funding, State aid and financial instruments to support structural investments.** Blending grants with loans and guarantees can help farmers finance major housing conversions and reduce upfront capital constraints.
- **The EU should provide clearer guidance on transitional support under State aid rules.** Clarification would help Member States design schemes that support structural investments and temporary income foregone during the transition while remaining compliant with EU competition rules.
- **Member States should prioritise animal welfare investments when implementing the EIB agriculture and bioeconomy**

facility, a dedicated EU instrument designed to mobilise large-scale investment in the agriculture sector. When negotiating agreements with financial intermediaries, Member States should ensure that financing instruments supported by the EIB explicitly enable investments in cage-free housing and other animal welfare improvements..

5.4 CAP support currently favours maintenance over transformation

While the CAP Strategic Plans for the period 2023 – 2027 support a wide range of practices aiming to improve animal welfare, only a small share of schemes directly support the phasing out of cage farming. Looking ahead, the Commission’s CAP proposals for the 2028–2034 CAP⁸² and the future MFF⁸³, (July 2025), introduce transition payments and extensification support, but also raise concerns about reduced ring-fencing for environmental spending. This may weaken incentives for Member States to prioritise structural changes, including improvements in housing conditions.

Despite some Member States having adopted national funding programmes, the potential of national instruments remains, in general, underutilised. Germany and Finland, for example, provide state aid (Germany) or CAP measures (Finland) to support the transition away from farrowing crates, while in France, public funding has supported individual calf pens, missing opportunities to steer resources towards collective or cage-free systems. Overall, **most current animal welfare schemes reward maintenance of practices already in place**. Their multipurpose nature dilutes the focus on housing transformation, creates a “late mover advantage,” and slows the pace of transition - **welfare schemes reward maintenance of practices already in place**.

The next CAP should contribute to the transition towards cage-free farming. Despite the ring-fencing for environmental and climate-related spending that also included animal welfare disappearing, unless it is reintroduced during the

⁸² [COM\(2025\) 560 final](#), Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL establishing the conditions for the implementation of the Union support to the Common Agriculture Policy for the period from 2028 to 2034

⁸³ [COM\(2025\) 570 final](#), COMMUNICATION FROM THE COMMISSION “A dynamic EU Budget for the priorities of the future – The Multiannual Financial Framework 2028–2034”

negotiations, the next CAP still has the potential to deliver for animal welfare and housing conditions. In this context, the introduction of transition payments, designed to aid farmers in moving towards more resilient production systems, represents an important opportunity to support improvements in animal welfare and housing conditions. During the approval process of national CAP plans, the Commission should ensure that the transition towards production systems with improved housing conditions, including cage-free rearing, is adequately incorporated in National Strategic Plans.

The CAP could also contribute to the scaling up of organic farming, which represents a relatively small share of the EU's livestock sector. The EU's current organic targets primarily focus on agricultural land and could be extended to include livestock-specific targets.

Recommendations

While the proposed 2028–2034 CAP introduces transition payments and extensification support that could accelerate the shift towards more resilient, high-welfare systems, progress will remain slow without clear prioritisation in National Strategic Plans and strong Commission guidance. **Ensuring that Member States make full use of transition payments, investment support and advisory services to improve housing conditions is essential for achieving meaningful welfare outcomes**

- **National Regional Partnership Plans should explicitly prioritise the transition to cage-free systems.** Especially Member States with high livestock densities or strong competitive advantages in specific sectors should be required to demonstrate how NRPPs will facilitate housing transformation, including through **transition payments and extensification support, investment aid, and advisory services**.
- **The Commission should issue clear guidance to safeguard animal-welfare ambition in NRPPs**, encouraging Member States to allocate sufficient resources to structural investments and transition measures despite the removal of environmental ring-fencing. In this perspective, the **Commission should use the approval process** to ensure that the transition towards cage-free rearing is clearly embedded and adequately resourced.

- **Member States and the EU should strengthen the role of the CAP in scaling up organic livestock farming.** The adoption of EU-level livestock-specific organic targets, for instance, through the definition of a minimum share of animals reared under organic standards, would send a clear market signal and help align national strategies. Embedding these targets into NRPPs would accelerate the uptake of production systems that inherently meet higher animal-welfare requirements, including cage-free housing.

5.5 Demand-side measures are underused but important for sharing costs along the value chain

Action at EU level should also address consumption and the demand side of animal-based products. The adoption of cage-free practices may affect the competitiveness of associated products, potentially leading to an increase in prices. However, these systems deliver long-term benefits for the environment and public health, which translate into broader economic gains over time.

It is therefore important to promote cage-free products and mitigate potential adverse effects on their price competitiveness, both in relation to cage-based products coming from within the EU and imports from third countries. The EU can support this through instruments under the Common Market Organisation, trade policy and by developing an EU-wide animal-welfare labelling scheme. Clear and credible labelling would help consumers differentiate cage-free from lower-welfare products, ensuring market opportunities for producers transitioning to higher-welfare systems.

Evidence from Member States shows that strong demand signals enable the sharing of transition costs beyond the farm level. In Germany, early retailer delisting of cage eggs and the use of husbandry labels supported investment in cage-free capacity. In Poland, more than 140 corporate pledges for cage-free eggs helped catalyse progress, although the continued dominance of cages demonstrates the limits of voluntary commitments without complementary public frameworks. Public procurement and clearer labelling also remain underused across Member States, despite their significant potential to shape demand.

At the same time, while many labelling schemes apply to animal-based products, **not all include or indicate aspects related to animal welfare or housing**

conditions. For shell eggs, rearing methods are consistently provided, but this is not common for other products, such as rabbit and veal meat. Furthermore, despite potentially containing animal-based products, existing labelling schemes mostly do not apply to processed products, limiting consumers' ability to identify cage-free options and reducing the visibility, and therefore the market pull, of higher welfare production across the broader value chain.

Recommendations

Growing demand for higher-welfare products is essential to sustain the transition to cage-free systems. Although cage-free practices may raise production costs, strong demand-side measures can help maintain price competitiveness and support producers.

- **The EU should strengthen trade policy to prevent unfair competition from low-welfare imports**, ensuring that products entering the EU market meet equivalent standards or are subject to appropriate safeguards.
- Consumer information should be improved through clear, **harmonised EU-wide animal-welfare labelling**, enabling consumers to identify cage-free and higher-welfare options across both primary and processed products.
- The **EU should promote organic production and consumption as a driver of market demand for cage-free products**, embedding organic uptake targets and supporting their integration into public procurement, marketing and consumer information policies.

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Annexes



7. ANNEX 1 - FRANCE

7.1 Key characteristics of the livestock sector in France

The agricultural sector is an important economic sector in France. In 2022, the production of the agricultural sector in France represented EUR 88.2 billion, which accounts for 17.9% of the value of the EU production (INSEE, 2024).

In 2023, in France, there were a total of 360,410 agricultural holdings⁸⁴, among which 173,160 included livestock, which represents 48% of agricultural holdings⁸⁵. Among these agricultural holdings, not all are specifically dedicated to livestock. In 2020, 37.7% of the agricultural holdings were livestock farms, while another 12.2% were coupled with at least one other type of production (Vettoretti and Maillard, 2024). The livestock sector represents an important part of the agricultural production, accounting for EUR 31.4 billion in 2022, 35.6% of the agricultural sector that year (INSEE, 2024).

The overall number of livestock units has been declining in France over the last 10 years, with a reduction of around 8% between 2010 and 2020 (INSEE, 2024). However, France is still the first country in the EU in terms of livestock units, accounting for 19.58 million LSU in 2023, followed by Spain (15.41 million) and Germany (15.02 million).

As highlighted in the table below, three animal categories are preponderant in the livestock sector, namely poultry, cattle and pigs.

Table 8: Livestock numbers in France and share in EU Livestock total

	Cattle	Pig	Poultry
Number of heads / LSU	16,478,260 heads (2024)	11,714,940 heads (2024)	4,146,050 LSU (2023)
Share of total LSU	60.59% (2023)	13.81% (2023)	21.18% (2023)
EU number of heads / LSU	71,896,320 heads (2024)	132,135,520 heads (2024)	19,597,160 LSU (2020)
Share of EU total	22,92% of EU heads (2024)	8% of EU heads (2024)	21.15% of EU LSU (2020)
Rank in EU	1 st in heads	3 rd in heads	1 st in LSU

Source: Eurostat, CAP context indicators

⁸⁴ PMEF Indicators data on Agriculture, C.12,

<https://agridata.ec.europa.eu/extensions/DataPortal/pmef-indicators.html>

⁸⁵ Agricultural holding with livestock, Eurostat,

https://ec.europa.eu/eurostat/databrowser/view/tag00124/default/table?lang=en&category=t_agr.t_ef

France holds a significant share of the EU livestock sector, with more than 20% of the cattle and poultry sector and is the Member State with the most livestock heads in these two sectors. France is also the second largest producer of rabbits in the EU (Gidenne et al, 2022) and the third largest producer of pigs in terms of heads.

The French livestock production is concentrated in specific regions, depending on the sector, and a significant share of the livestock production is located in the west of France. For instance, in Brittany and Pays de la Loire account together for 69% of the national pig production and 57% of the national poultry production, while accounting for 39% of the dairy cattle sector together with Normandy (CESE, 2024). Pig and poultry farms are further specialising in Brittany. For example, the many traditional mixed-farm structures with an average surface of 10 ha have undergone a technical revolution, which has led them to specialise in intensive poultry and pig farming (Hulot, 2021). The production of rabbit meat is also concentrated in Brittany and Pays de la Loire, as 56% of the national production was located in these two regions in 2020 (CFA, 2024). Certain livestock sectors are also concentrated in different regions. For instance, 46% of the agricultural holdings specialised in ovine meat production are located in the south-west regions⁸⁶ (DRAAF Occitanie, 2020).

The size of the livestock sector in France being significant, it represents a significant part of the GHG emissions of the agricultural sector (59%), which is mainly due to the methane emissions of the cattle sector (INRAE, 2024). The sector also has a significant impact on water pollution, notably due to the important emissions of nitrogen and phosphorus coming from livestock production (CESE, 2024). As a consequence, the effects of these emissions is particularly noticeable in regions with high livestock density. For instance, in Brittany, in 2024, 73% of the monitoring stations that measure and assess water quality showed a nitrate concentration higher than the maximum level fixed by the EU's Nitrate Directive (25mg/L)⁸⁷.

7.2 Consumption and trade related to animal products in France

The average individual consumption of meat in France reached its apex in 1998 and has been slightly decreasing since then, even if the individual consumption has been relatively stable since 2010, and even slightly increasing between 2023 and 2024 (CESE, 2024). The average consumption of meat was 83kg per inhabitant per year between 2020 and 2022, representing a total of 5.7 million

⁸⁶ This includes Nouvelle-Aquitaine and Occitanie

⁸⁷ SAGE (2020) <https://bretagne-environnement.fr/nitrates-cours-eau-bretons-datavisualisation>

tonnes of carcass equivalent weight (Vettoretti and Maillard, 2024). The slight decrease in individual consumption has been compensated by the increase of population, leading to an overall increase of meat consumption (CESE, 2024). Beyond the overall trend of meat consumption, the split between the types of meat consumed has also evolved. The share of poultry meat in the overall meat consumption has been increasing over recent years, while bovine meat followed an opposite trend (Vettoretti and Maillard, 2024), as did the rabbit consumption (Gadoud and Seinger, 2022). Pig meat, however, due to its affordable price and the diversity of products it can result in, remained the main meat consumed in France, with 37% of the overall meat consumption until 2023 (CESE, 2024). For the first time in 2024, poultry meat consumption was higher than pig meat consumption⁸⁸. However, this relative stability in meat consumption was not matched by the production side, leading to France becoming a net importer of meat. As a consequence, France's meat trade balance went from a benefit of EUR 770 million in 2000 to a deficit of EUR 3 billion in 2020 (Vettoretti and Maillard, 2024). These numbers are also the consequence of the smaller increase in exports compared to imports. As for the consumption, the trade balance varies between the different types of meat. For instance, for pig meat, the trade balance is positive for France, this is not the case for bovine and poultry meat (Agreste, 2025).

Regarding the consumption of other animal-based products, the consumption of eggs tends to increase, due to their affordable price in the context of food price inflation, while the consumption of milk decreased by 9% between 2016 and 2021 (CESE, 2024). Overall, the trade balance of France for all animal-based products was still negative, as in 2024, the difference in value between exports and imports resulted in a deficit of EUR 900 million (Agreste, 2025). The trade deficit for the overall animal based products is lower than the deficit for meat only, as it is compensated by a positive trade balance for live animals (+ EUR 2.1 billion in 2022), as well as certain animal-based products, such as milk products (+ EUR 2.2 billion in 2022), while the balance for eggs is close to equilibrium (CESE, 2024).

⁸⁸https://www.franceagrimer.fr/sites/default/files/2025-07/SYN-VIA-Conso%20viande%20Fce2024_0.pdf

7.3 The transition to cage-free farming for the calf sector in France

7.3.1 Key characteristics of the sector

In 2023, France had 4.63 million bovine animals, which were below 1 year old⁸⁹ (Duflot, 2025). Calves can be born in either farms specialised in dairy production or in farms specialised in bovine meat production. Within dairy farms, a part of the female calves are generally kept for herd renewal, which represented 34% of the dairy calves in 2021 (Pomiès et al, 2023), while male calves are most often sold to agricultural holdings specialised in bovine meat production (veau de boucherie), to be fattened and slaughtered for veal or exported for fattening (mainly to Spain).

Calves may also be born in holdings specialised in meat production (élevage allaitants). Here as well, some of the female calves can be kept for herd renewal, as suckler cows, while the other will be destined to meat production, and fattened either on the farm or they can be sold to another holding for fattening, or for the vast majority, to export as "broutard".

In terms of meat production, in 2023, 516,752 calves were dedicated to slaughter for veal production (Duflot, 2025). France is the second producer of veal in Europe, behind the Netherlands, with 154,000 tonnes of carcass equivalent weight produced in 2023 (FranceAgriMer, 2025b). At the same time, France is the main producer of bovine meat in the EU, with 1.2 million tonnes of carcass equivalent weight produced in 2023 (FranceAgriMer, 2025c).

Regarding the dairy industry, France produced 23.3 billion litres of milk in 2023, a number which has been relatively stable since 2000 (CNIEL, 2025). This represented 16.2% of EU total, the second-highest percentage after Germany⁹⁰.

While dairy cows are concentrated in the North-West of France, suckler cows are mostly found within the centre of France (INSEE and Agreste, 2024). The production of calves is relatively concentrated in 3 regions of the West of France (Brittany, Pays de la Loire, and Nouvelle-Aquitaine), which together represent 56% of the calves destined to slaughter for veal production (INTERBEV, 2025).

⁸⁹ An animal is considered a calf until it is 8 months old.

⁹⁰ https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Milk_and_milk_product_statistics

Use of cages in the sector

The use of individual pens for calves concerns mostly the dairy and veal sector, as regarding meat production, suckler calves and calves reared in holdings specialised in calves fattening, most of the time either stay with their mother, or are reared collectively, after a few weeks (Pomiès et al, 2023).

For the dairy sector, a survey conducted in the frame of the “Colocavo” project, conducted within 227 farms in France, found that most of the calves are housed in individual pens for 3 to 4 weeks before being housed collectively. Within this survey, 7% of the farms declared that calves were housed collectively right after their birth⁹¹⁹².

However, besides housing calves collectively, there are other alternatives to the use of individual pens for calves. As a matter of fact, certain calves are kept with their mother, either housed full-time or part-time with their mom, while farmers may also use “nurse cows” (vaches nourrices), which would “adopt” one or multiple calves to feed them (Petit and Hellec, 2023).

It must be specified that calves can still be housed individually, even when fed through their mother, as they can be in contact only for the feeding time or during a delimited time, which still represents an improvement of the housing conditions of calves.

Demand drivers and trends in consumption

In 2024, the consumption of meat from Bovine animals in France was 1.43 tonnes of carcass equivalent weight (INTERBEV, 2025). The individual consumption of bovine meat in France was 21.4kg of carcass equivalent weight per inhabitant, which represents 25.7% of the meat consumed individually (FranceAgriMer, 2025c). The consumption of veal by individuals at home represented 58.5 tonnes of carcass equivalent weight, representing 7% of the meat consumed at home (FranceAgriMer, 2025b).

⁹¹https://idele.fr/colocavo/publications/detail?tx_atolidelecontenus_publicationdetail%5Baction%5D=showArticle&tx_atolidelecontenus_publicationdetail%5Bcontroller%5D=Detail&tx_atolidelecontenus_publicationdetail%5Bpublication%5D=22825&cHash=710d87aa84181af92323af189d2192c9

⁹²https://idele.fr/colocavo/publications/detail?tx_atolidelecontenus_publicationdetail%5Baction%5D=showArticle&tx_atolidelecontenus_publicationdetail%5Bcontroller%5D=Detail&tx_atolidelecontenus_publicationdetail%5Bpublication%5D=23442&cHash=4c6cf297c9b778ad6e6d6237df7a6e3c

For what regards the overall consumption of dairy products, it represented 8 million tonnes in 2021, which represented an average yearly consumption per inhabitant of 49kg of milk and dairy products (CESE, 2024).

Trade in the calf sector

In 2024, France exported 238,600 tonnes of carcass equivalent weight of bovine meat, while importing 363,300, which means that the balance in trade is negative in volumes (INTERBEV, 2025). However, the balance of live animals is largely positive, notably for calves, with 367,000 calves exported in 2024 (Dufлот, 2025), mainly towards Spain (FranceAgriMer, 2025,b).

For dairy products, the trade balance of France is positive in value, as France's exports of milk and dairy products represented EUR 11.3 billion in 2024, while imports represented EUR 7.7 billion the same year, resulting in a balance of EUR +3.6 billion (CNIEL, 2025).

7.3.2 Barriers and enablers to the implementation of a cage-free transition for calves in France

Considering the importance of the cattle sector, as highlighted above, a large number of calves are born in France every year, either in dairy farms or in farms specialised in cattle meat production. A significant share of these calves is still housed in individual pens during the first weeks of their life, especially in the dairy sector, despite the existence of alternatives, such as calves housed collectively or calves kept with their mother. However, even if the **benefits of these alternatives on calves' welfare** have been widely acknowledged, their implementation still faces certain challenges, notably in dairy farms.

As explained in more detail in the table below, there is no specific **legislation** related to calves in France. Moreover, the delay of the revision of EU legislation regarding the welfare of calves leads to a lack of visibility for farmers and may reduce farmers' initiatives to implement collective housing for calves.

Another explanation may come from the lack of **funding instruments** supporting alternatives to individual pens for calves. As mentioned in the table below, at national level, the potential of financing instruments for supporting collective housing for calves remains largely underutilised, while public funds are still being used to support the creation of individual pens for calves. Beyond that, within the CAP strategic plan of France, it is unclear to what extent support schemes that have the potential to support a transition towards collective housing for calves are being directed towards this objective. As a consequence, the housing of calves could be better addressed through the CAP, thanks to a more targeted approach

to specific welfare issues, which could include the support of specific practices or training for farmers.

Likewise, the full potential of **labelling schemes** to contribute to better housing practices for calves also remains unexploited, as despite many labels related to calves existing, only a residual number require collective housing for calves. However, certain initiatives, whether they come from the private sector or from government-financed projects, aim to promote collective housing practices for calves.

These instruments could bring an added value to the sector, not only for the welfare of animals, but also, as explained in the table below, for the **farmers' interest**, as these alternatives can at times be associated with increased satisfaction and reduced labour demand for farmers.

Table 9: Barriers and enablers for the transition to cage-free animal farming in France's calf sector

Barriers and enablers
Regulatory and policies As laid down in Directive 2008/119/EC, transposed in France, calves must be housed collectively after the age of 8 weeks, while before that, individual pens must allow contact between the calf and other animals. There is no specific legislation related to calves adopted in France. However, a revision of the EU legislation on animal welfare was announced in 2020⁹³ and is now postponed to an unknown date. This could represent an opportunity to improve the housing conditions of calves, for instance, requiring collective housing before the current limit of 8 weeks. On the regulation of different practices which may be used to raise calves, the adoption of a standard legislation may lead to a "normalisation" of practices, which could be detrimental to the diffusion of positive practices among farmers. This is one of the reflections shared by Petit et Hellec (2023), who also consider that, for suckler calves, this is the absence of regulation that currently allows a wide spectrum of practices through a bottom-up approach, which would be the reason why these practices can be spread easily among farmers, notably through professional networks, notably organic ones.
Funding instruments The housing conditions of calves in France might be influenced by the CAP Strategic Plan of France, as it provides an important financial support for farmers. In this regard, many support schemes designed by France aimed to support the transition or the maintenance of organic farming. This may contribute to developing collective housing for calves reared under organic rules, as the organic regulation requires calves to be housed collectively⁹⁴. France supports organic farming through several support schemes, notably through the rural development

⁹³ https://food.ec.europa.eu/animals/animal-welfare/evaluations-and-impact-assessment/revision-eu-animal-welfare-legislation_en

⁹⁴ [Regulation \(EU\) 2018/848 on organic production and labelling of organic products](#)

Barriers and enablers

programme⁹⁵, which aims to support the conversion of farmers to organic farming. These support schemes represent a total public expenditure of EUR 982 million for the 2023-2027 period⁹⁶. However, it is uncertain which share of this budget is dedicated to livestock farmers, and in particular to dairy and beef farmers. Moreover, France adopted a single eco-scheme, for which, to be eligible, farmers must comply with one of the three requirements, with one of them being an organic farmer. The total public expenditure for the 2023-2027 period of this eco-scheme is EUR 8.5 billion, but here as well, it is unclear what share of the funding is dedicated to organic livestock farmers⁹⁷. Additionally, the CAP strategic plan of France may also support investments aiming to improve animal welfare, including the housing conditions of animals.

The production of suckler calves benefits from CAP subsidies through the Coupled Income support. To be eligible for this payment, farmers must be rearing calves under certain specific labels, either geographical indications, "label rouge" or organic farming. The budget for this support scheme is EUR 20.35 million for the current CAP period. Even if this scheme does not concern calves raised in dairy farms, where individual pens are most common, there is room here to support collective housing, as it could be included either in the labels or in the requirements to be eligible for payments.

Overall, if certain support schemes adopted by France may encourage the adoption of new practices, a significant part of the budget is dedicated to schemes which support already existing practices. For instance, (Lassalas et al., 2023), considered that 99.6% of the farmers in France already fulfilled the requirements to be eligible for the eco-scheme. However, collective housing for calves could be further supported through Knowledge-exchange schemes, or through other schemes of the rural development program within the CAP, which could target collective housing practices more specifically.

At national level, despite being authorised by the EU framework on State aid⁹⁸, France did not adopt specific state aid aiming to support farmers in the adoption of collective housing for calves. Additionally, the purchase of new agricultural buildings can often be supported by regions, but they rarely require commitments related to animal welfare. For instance, the region Grand-Est supports the purchase of new housing facilities for calves, which may include individual pens⁹⁹. The potential for supporting collective housing in calves farming remains largely underutilised at national level (Voesch, 2015), while public funds are still being used to

⁹⁵ This refers to support schemes listed in article 69 of the [EU regulation on CAP Strategic Plans](#),

⁹⁶ Directorate-General for Agriculture and Rural Development, [Catalogue of CAP interventions](#)

⁹⁷ idem

⁹⁸ COMMUNICATION FROM THE COMMISSION Guidelines for State aid in the agricultural and forestry sectors and in rural areas (2022/C 485/01), [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52022XC1221\(01\)](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52022XC1221(01))

⁹⁹ https://les-aides.fr/aide/VQk_3w/region-grand-est.aide-aux-investissements-d-adaptation-des-elevages-preparer-l-avenir.pdf

Barriers and enablers

support the creation of individual pens for calves¹⁰⁰.

Costs

Considering the diversity of alternative practices to individual pens for calves, it is complex to monitor uniformly the effect of costs and productivity of these alternatives.

On the first hand, these alternatives may lead to a reduction of labour demand. In this regard, Petit and Hellec (2023), underlined that many dairy farmers who decided to let the calf suckle milk from its mother or a nurse cow observed a lower demand in terms of labour. They also underline that at times, the lack of workforce on farm triggered this practice, to compensate for the departure of a worker from the farm. Likewise, collective housing of calves can be less demanding in terms of work, as the inspection and the feeding of animals, as well as the cleaning of facilities, require less time when calves are housed collectively¹⁰¹. This is notably a factor encouraging farmers to rear calves collectively.

This effect on labour demand was also confirmed by Mitova (2024), a study conducted in Bulgaria. Moreover, even if the result of this study does not come from the French calf sector, it can be interesting to note that the study concluded that the ban on individual pens for calf should not lead to serious adverse effects on production costs or investment burden.

The transition towards collective housing of calves, or calves being kept with their mother, may indeed require new investments, in case the agricultural holdings do not allow these practices in their current form. In this regard, (Michaud et al., 2018), observed that certain farmers who had decided to feed calves through their mother or a nurse cow chose to stop this initiative due to the inadequacy of the buildings at the agricultural holding.

Finally, the use of nurse cows can sometimes result from an "optimisation" decision by farmers, as they find a new function for a cow which does not meet the expected standard for milk production (Mastitis, lameness, productivity) (Petit and Hellec, 2023). This practice may therefore offset the costs associated with the lower productivity of a specific cow. In general, the use of a nurse cow for the rearing of calves may result in lower volumes of milk sold on the farm, but on the other hand, the good health of cows also leads to a decrease in veterinary costs (Pomiès et al., 2023).

Demand side measures

A working group, composed of animal welfare NGOs and the dairy industry (CNIEL), has been focusing on the housing conditions of calves and the need to develop collective housing. The different parts of the working group signed a common declaration in 2025¹⁰², in which they agreed on the benefits for calves and farmers to implement collective housing for calves. In this declaration, the different parts also committed to sharing these practices within their network and within the farm community, as well as advocating for financing support, which would be necessary to adopt collective housing practices.

¹⁰⁰ https://les-aides.fr/aide/VQk_3w/region-grand-est.aide-aux-investissements-d-adaptation-des-elevages-preparer-l-avenir.pdf

¹⁰¹ https://idele.fr/colocavo/publications/detail?tx_atolidelecontenus_publicationdetail%5Baction%5D=showArticle&tx_atolidelecontenus_publicationdetail%5Bcontroller%5D=Detail&tx_atolidelecontenus_publicationdetail%5Bpublication%5D=22825&cHash=710d87aa84181af92323af189d2192c9

¹⁰² <https://umbraco.ciwf.org/media/2mqb3kdi/note-synthese-concertation-veau-signee.pdf>

Barriers and enablers

Regarding labels, the main label requiring specific housing conditions for calves is the organic one, as the EU regulation on organic farming¹⁰³ prohibits the use of individual pens for calves after one week of age. The use of this label is therefore not specific to France.

An important label for meat production in France is "Label rouge", which lays down several "general" requirements for veal meat production¹⁰⁴. These requirements do not concern the need for calves to be housed collectively. Two requirements may, however, influence the social environments in which calves are reared. Firstly, when calves are housed collectively, this label requires more space per animal (1.8m²) and the floor should be made of straw. Secondly, for the feeding of calves, they must suckle their mother or a "nurse cow", or at least be fed through "natural milk" produced on the farm.

On top of that, there are also labels for specific production and breeds, which include "label rouge" but also geographic indications, which may have specific requirements. For instance, the geographic indication "Veau d'Aveyron et du Ségala" requires calves, among other requirements, to be housed collectively¹⁰⁵.

Finally, the adoption of labels specifically related to the welfare of calves (e.g. similar to what currently exists for laying hens), could contribute to the promotion of collective housing practices.

Animal welfare and health

Collective housing for calves appears to have a positive outcome for their welfare, allowing more diverse behaviour and social interactions, lowering stress and improving the adaptability of the calf (Nielsen et al., 2023). An important factor for the health of calves is the size of the group in which they are housed collectively. As a matter of fact, (Nielsen et al., 2023 considered that calves should be housed in small groups (from two to seven calves) to limit the spread of diseases. They also considered that pair-housing had similar effects to individual housing in terms of the health of the animals. Among the 110 dairy farmers interviewed by (Michaud et al., 2018), 51% considered that the fact that the calf would suckle its mother's or a nurse cow's milk was motivated by the improvement of the health of the animals.

Research, projects, and innovation

"Colocavo" is a project funded by the Ministry of Agriculture in France to contribute to the collective housing of calves in the first weeks after their birth. The project notably aims to propose operational solutions to implement collective housing for calves, which would take into account animal welfare, labour demand and economic performance. The project also aims

¹⁰³ REGULATION (EU) 2018/848 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R0848>

¹⁰⁴ Annexe de l'arrêté du 18 mars 2024 fixant les conditions de production communes relatives à la production en label rouge « veau » Bulletin officiel du Ministère de l'agriculture et de la souveraineté alimentaire n°2024-13, <https://extranet.inao.gouv.fr/fichier/CPC-Label-Rouge-Veau-en-vigueur.pdf>

¹⁰⁵ Cahier des charges de l'indication géographique protégée « Veau d'Aveyron et du Ségala » homologué par arrêté du 4 août 2025 publié au JORF n°0181 du 6 août 2025 Bulletin officiel du Ministère de l'Agriculture et de la souveraineté alimentaire n°2025-32 https://info.agriculture.gouv.fr/boagri/document_administratif-4b074368-a451-44aa-bea8-ae54497059b5/telechargement

Barriers and enablers

to develop support tools for farmers implementing collective housing, as well as to assess the acceptability of the different technical solutions.

The Horizon project “Resilience for Dairy”, taking place in 8 countries in 2021 and led by the French Institut de l’Elevage IDELE, aims to strengthen the exchange between farmers, researchers and relevant actors of the dairy sector. Animal welfare is one of the objectives pursued by the project. As a result, webinars and training have been provided through the project, with several focusing on the collective housing of calves¹⁰⁶.

7.4 The transition to cage-free farming for the rabbit sector in France

7.4.1 Key characteristics of the sector

In 2023, France produced 25,280 tonnes of carcass equivalent weight of rabbit meat (CFA, 2024). The production of rabbit meat has been declining in France over recent years, as the current numbers show a reduction of the production by 9% compared to 2022 and 23% compared to 2020, in which France produced 32,718 tonnes of carcass equivalent weight (FranceAgriMer, 2025a). The sector is relatively concentrated in western France, as in 2020, as 64% of the national production was located in Brittany, Pays de la Loire and Nouvelle-Aquitaine (CFA, 2024). Similarly, the number of professional rabbit farmers is also decreasing, as currently there are 800 professional farmers rearing rabbits, with ¼ specialised in rabbit production (Gidenne et al, 2022). Additionally, it must be noted that 30% of these farmers will be eligible to retire in the next 10 years (FranceAgriMer, 2025a).

Use of cages in the sector

There are differences in housing systems for fattening rabbits and reproductive does. For reproductive does, collective housing has been experimented, but the results did not allow a wide adoption of these practices in commercial farming (Van Damme et al., 2021).

Regarding fattening rabbits, most of the animals are housed in collective cages, which is considered “conventional practices”, and represent more than 90% of the production (Gidenne et al., 2022, France AgriMer, 2025a). Moreover, out of the 668 professional holdings rearing rabbits, 622 were equipped with conventional housing, which includes cages, representing 93.1% of the holdings (Pedro, 2024).

¹⁰⁶ <https://resilience4dairy.eu/project>

Alternatives to collective cages exist for fattening rabbits, including notably floor pens or elevated pens, which represent around 10% of the total production in France, while systems with outdoor access only represent a residual part of the production in France (Interview with a research institute). These systems with outdoor access may include, i) fixed fenced parks, ii) movable enclosures (or cages) and iii) fixed buildings with an exercise area (Gidenne et al., 2022).

Demand drivers and trends in consumption

The average consumption of rabbit meat per inhabitant in France was 0.33 kg for the year 2023 (CFA, 2024). This number has been declining over recent years, as the average consumption was 0.45kg per inhabitant in 2020 (Gidenne et al, 2022). The increase in population is not sufficient to offset the decrease in individual consumption, as the overall consumption of rabbit meat in France is declining by approximately 5% per year (Gadoud and Seinger, 2022). However, (Gidenne et al, 2022), observed that the demand for organic rabbit meat was higher than the supply.

This overall reduction of demand, which is less important than the reduction of production, results in a certain pressure on rabbit farmers. As a consequence, the rabbit sector is dynamic, and farmers tend to be keen on adopting new practices to gain visibility and invert this production trend (Interview with research institute)

Trade in the rabbit sector

Out of the 25,300 tonnes of carcass equivalent weight of rabbit meat produced by France in 2023, 3,850 were dedicated to export (CFA, 2024). This allows France to have a positive trade balance for rabbit meat both in volume and value, as, on the other hand, imports represented 925 tonnes of equivalent weight, mainly coming from China. In the first semester of 2024, the trade balance of France improved by 40.8%, resulting in a difference of + EUR 7.8 million in 2023 (CFA, 2024). A significant part of the export of rabbit meat is directed towards third countries, notably towards the US, UK and Switzerland, making France the first European exporter towards third countries (CFA, 2024).

7.4.2 Barriers and enablers to the implementation of a cage-free transition for the rabbit sector in France

Despite France being the second rabbit producer in the EU, the sector is facing **negative trends, whether it concerns demand or production**. As mentioned above, in order to reverse this trend, the sector is dynamic and keen on adopting new practices, which could increase visibility and reach new consumers. One aspect of the production which is being discussed in this context is the transition towards a more significant share of cage-free farming in the production.

Currently, around 90% of the rabbit production relies on the use of conventional cages. If alternatives for reproductive does are not always conclusive, several alternatives exist for fattening rabbits, with positive effects on the welfare of animals. The implementation of cage-free practices at a large scale is, however, facing several challenges.

In this regard, the current absence of specific **legislation** for rabbits at national level, alongside the announcement of a potential EU legislation for rabbits, restrains the visibility of farmers and potentially reduces farmers' initiative to implement cage-free practices.

Additionally, as indicated in the table below, the **financial costs** associated with transitioning away from conventional cages for the whole rabbit production of France have been estimated between EUR 112 million and EUR 132 million. However, besides the support dedicated to organic farming, there is a lack of **funding instruments** at national level.

Likewise, through its **CAP strategic plan**, France could contribute to supporting alternative housing practices for rabbits, notably thanks to schemes supporting investment or organic farming, even if it remains uncertain what share of these support schemes is contributing to collective housing for rabbits.

An additional opportunity to encourage the transition to alternative housing systems for rabbits is the implementation of **labelling schemes** that include housing condition requirements. Some producers have already started using these schemes, as outlined in the table below. This is particularly relevant given the current demand for organic rabbit meat, which exceeds the supply. Moreover, the rabbit sector is keen on adopting practices that enhance visibility and attract a broader audience.

Table 10: Barriers and enablers for the transition to cage-free animal farming in France's rabbit sector

Barriers and enablers
Regulatory and policies
Beyond the EU Directive for the protection of animals kept for farming purposes, adopted in 1998 ¹⁰⁷ , there is no specific legislation for the rabbit sector, neither at the national nor at the European level. In 2021, the Commission positively responded to the European Citizens Initiative 'End the Cage-Age'. The Commission originally announced a legislative proposal in 2023 to ban cages by 2027 for several sectors, including rabbits ¹⁰⁸ . However, this initiative has

¹⁰⁷ COUNCIL DIRECTIVE 98/58/EC of 20 July 1998 concerning the protection of animals kept for farming purposes, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:31998L0058>

¹⁰⁸ https://ec.europa.eu/commission/presscorner/detail/fr/ip_21_3297

Barriers and enablers

been postponed, and despite the Commission's reaffirmation of its commitment in 2025, no date has been communicated for when this potential proposal could be released¹⁰⁹. The uncertainty about the future legislation applicable to rabbit farming represents a barrier to investment towards alternative rearing methods. This is also true for reproductive does and the investment towards enriched cages (Interview with a research institute).

Funding instruments

Under the current CAP, France supports rabbit producer organisations through the sectoral support. This scheme aims to support operational programmes in the rabbit sector, to pursue several objectives, notably to improve production and distribution in the rabbit sector. One of the objectives highlighted in the French CSP, is the need to support farmers in transitioning towards new methods of production, notably cage-free farming¹¹⁰. Moreover, considering that the EU organic regulation requires rabbits to be housed collectively¹¹¹, the support provided by the CAP strategic plan of France to organic farming may contribute to phasing out cage farming for rabbits. It is, however, difficult to identify what is the share of rabbit farming in the support schemes related to organic farming (see section 0 on calves).

Costs

The transition from conventional farming to cage-free farming for rabbits may necessitate structural investment on farm. In this regard, (Pedro, 2024) estimated that the conversion of an agricultural building to cage-free farming would, on average, cost EUR 232 per rabbit, while the creation of a building for fattening on the farm would cost, on average, EUR 511 per rabbit and the creation of a building for breeding and fattening EUR 812 per rabbit (Pedro, 2024).

At national level, depending on the estimation, the overall cost associated with a conversion of 100% of the rabbit fattening farms to cage-free farming could be between EUR 112 million and EUR 132 million (CIWF, 2024 and Pedro, 2024). From these numbers, around EUR 90 million will be dedicated to the conversion, while the rest will be the consequence of a lower production.

Regarding the economic effect on cage-free farming for fattening rabbits, the growth rate is, on average, lower for rabbits fed through pasture (reaching 2.4kg after 100 days) than rabbits reared conventionally (2.4kg after 73 days) (Gidenne et al., 2022).

Likewise, for reproductive does, even if the cage-free production remains residual, Gidenne et al. (2022), observed that, despite no reference to a minimum age for slaughtering in EU legislation, the average period between two farrowing periods is longer in organic farming (138 days) compared to conventional farming (56 days). Overall, the financial reward per female doe is slightly better for organic farming compared to conventional, but due to the size of holdings (which tend to be more important in conventional), the overall benefits of organic farming remain lower than conventional (Gidenne et al., 2022). Likewise, the authors conducted an analysis of the performance of several organic rabbit farms compared to conventional ones, observing better economic performances for the organic farms regarding the costs for feeding, veterinary fees and a lower dependency on inputs.

¹⁰⁹ https://food.ec.europa.eu/animals/animal-welfare_en

¹¹⁰ France CAP Strategic Plan, <https://agriculture.gouv.fr/telecharger/131861>

¹¹¹ REGULATION (EU) 2018/848 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R0848>

Barriers and enablers**Demand side measures**

Currently, the demand for organic rabbit meat is more important than the supply, which creates an opportunity for farmers (Gidenne et al., 2022). In 2018, the main rabbit industry organisation (CLIPP) considered that the additional cost associated with cage-free farming could lead to an increase of 30% in prices, meaning that the acceptance by consumers to pay more for these practices will be critical for the sector (CLIPP, 2018).

On the other hand, this rabbit industry is committed to promoting the “EBENE” methods within rabbit farmers, as a tool to improve animal welfare on farm. This tool includes an application for mobile, aiming to monitor the welfare of rabbits on farms (CLIPP, 2018).

The sector is keen on implementing alternative practices, as they seek to gain visibility and reach a wider audience, in order to reverse the production trend (Interview with a research institute). The initiative “Lapin & Bien”, which was created by several rabbit producers members of the project “Eleveurs et bien”, promotes an ethical production of rabbit meat. To be commercialised under this common “brand”, rabbits must, among other requirements, be reared in collective pens¹¹². Likewise, the cooperative “Terrena”, implemented the brand “La nouvelle agriculture”, which will require cage-free housing conditions for rabbits as of 2026¹¹³. The voluntary labelling scheme Etiquette Bien-Etre Animal began exploring how to extend the work to rabbit production, enabling the producers engaged into cage free farming to gain visibility and promote higher welfare practices.

Animal welfare and health

There is an important differentiation in the effect of collective housing on the welfare of fattening rabbits and reproductive does. For what regards reproductive does, the effect of collective housing on their welfare remains uncertain, as it may, for instance, result in increased injuries (Warin et al., 2025). As a matter of fact, rabbit appears to be fragile animals, and rabbit farming can face adverse consequences on the health of animals, which the use of cages contributed to reduce (Doré and Derbez, 2025). As a result, in France, many farmers currently relying on conventional housing practices consider that adopting alternative housing practices would compromise the health of animals (Doré and Derbez, 2025). However, scientific knowledge on the effect of alternative rearing systems on both behaviour and productivity of fattening rabbits is limited, but these systems are still considered better for rabbit welfare (Festiveau et al., 2021). For what regards systems with outdoor access, they may increase certain aspects of animal welfare, such as reduction of stress, access to natural light and allowing behaviour, while these systems may also reduce growth and could have a negative effect on the health of animals (Festiveau et al., 2021).

¹¹² <https://lapinetbien.com/histoire/>

¹¹³ <https://www.terrena.fr/engagements/les-eleveurs-de-la-filiere-lapins-de-terrena-sengagent-a-adopter-dici-2026-un-nouveau-modele-delevage-hors-cage-pour-lensemble-des-lapins-la-nouvelle-agriculture/>

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8. ANNEX 2- SPAIN

8.1 Key characteristics of the livestock sector in Spain

The Spanish agricultural sector remains a key pillar in the country, in particular when it comes to exports and the development of rural areas. From an economic perspective, the agricultural production value reached 65 billion EUR in 2023 ([Eurostat](#)), making Spain the EU country with the fourth highest production value after France, Germany and Italy (MAPA, 2023). In 2022, the livestock sector was estimated to represent a 40% share of the total agricultural production value ([Cebrino Casquero et al. 2023](#)).

Spain had about 800,000 agricultural holdings¹¹⁴ in 2023, 19% of which included livestock production¹¹⁵. The number of holdings with livestock has been reduced by half since 2005 (ibid). In terms of livestock species, half of the holdings with livestock include cattle (51%), followed by sheep and goats (21%), pig farms (9%) and poultry (2%) (data for 2016). While most livestock farms are dedicated exclusively to livestock, farms combining arable land and livestock and mixed farming systems represented 11% and 3% of the holdings, respectively, in 2016¹¹⁶. The average economic value of agricultural holdings in Spain is 50k EUR, which is above the EU average, and the average size of the holdings is 21 ha, also above the EU average of 17 ha (MAPA, 2023).

As shown in Table 11, three animal categories account for the vast majority of LSU in the Spanish livestock sector: **pigs, cattle and poultry**. Spain ranks second in the EU in terms of total livestock units, with 15.41 million LSU in 2023. The country holds one quarter of the EU's pig population (34 million heads), which has increased by 18% since 2016 (from a population of 29 million) ([Eurostat](#)). Contrary to pigs, cattle numbers have remained relatively stable over the past decade and have even been reduced by 2% between 2016 and 2024.

¹¹⁴ PMEF Indicators data on Agriculture, C.12,

<https://agridata.ec.europa.eu/extensions/DataPortal/pmef-indicators.html>

¹¹⁵ Agricultural holding with livestock, Eurostat,

https://ec.europa.eu/eurostat/databrowser/view/tag00124/default/table?lang=en&category=t_agr.t_ef

¹¹⁶ All these from INE « encuesta sobre la estructura de las explotaciones agrícolas del año 2016”

Table 11: Livestock numbers in Spain and share in EU livestock total

	Cattle	Pig	Poultry
Number of heads / LSU	6,173,960 heads (2024)	34,565,280 heads (2024)	2,720,000 LSU (2023)
Share of total LSU	27.6%	43.9%	17.7%
EU number of heads / LSU	71,896,320 heads (2024)	132,135,520 heads (2024)	19,597,160 LSU (2020)
Share of EU total	8.6% of EU heads (2024)	26.1% of EU heads (2024)	8.6% of EU heads (2024)
Number of heads / LSU	5th in heads (2024)	1st in heads (2024)	3rd in LSU (2020)

Source: [Eurostat](#) and [CAP context indicators](#)

Livestock production in Spain is not evenly distributed throughout the country. Cattle are mostly located in the centre and West of the country (Autonomous Communities of Castilla León, Extremadura), as well as in the North (Galicia, Cantabria, Asturias and Aragón). Pig production is generally concentrated in the Northeast (Aragón, Catalonia) and in the Southwest (Andalucia). Poultry production is found both in the North (Aragon, Catalonia, Navarra) as well as in the East (Valencia) and the Centre (Castilla la Mancha) of the country. Sheep and goats are notably present in Extremadura, Murcia, Andalucia and Aragon. Rabbit farming is mostly present in five Autonomous Communities (Castilla y León, Catalonia, Aragon, Galicia and Valencia).

8.2 Consumption and trade related to animal products in Spain

Meat consumption in Spain has remained stable over the past years (MAPA, 2024a) with an average consumption of 41.64¹¹⁷ kg per inhabitant per year in 2024. Over two-thirds of the meat consumed is fresh meat (72.6%), while processed meat represents one quarter of the total sold volumes (24.7%) and frozen meat represents 2.7%. Per capita consumption is highest for adults over 65 years old (60.52 kg) while the consumption of the 35–49-year-olds is half of their value (32.34 kg). Poultry meat has the largest share of sold fresh meat with 41.5% of the total sales, followed by pig meat (30.8%) and cattle (12.9%). More than half of the meat consumed in Spain is sold in supermarkets (54.1%). Spanish citizens are also large consumers of processed meat, mostly from pigmeat. The consumption of processed meat in Spain reached 10.29 kg per capita in 2024, with the famous Spanish cured ham representing 26.1% of the total.

¹¹⁷ Note that some databases report values of up to 90 kg per capita, which are considered less accurate (read Delgado Perea, 2023).

From a historical perspective, Spain has reduced its diversity in meat consumption over time. While in the 1960s the consumed amounts of different types of meat were similar in terms of weight, the share of pigmeat, first, and poultry, the diversity has been reduced in recent decades (Delgado Perea 2023). It is also interesting to note that while the increase in meat consumption until the 1970s was attributed to an increase in income, the more recent evolution has not responded to income changes (Delgado Perea, 2023). In Spain, two-thirds of pigmeat is consumed through cold meats, while fresh and frozen meat represents around one third of the consumption (Delgado Perea, 2023).

In terms of other livestock products, Spanish citizens consumed around 142 eggs per capita (~9 kg of eggs), with an 8% increase since 2008 (MAPA 2024a). Milk consumption has decreased by 12% over the past fifteen years, due to a reduction in milk and non-processed dairy products. However, other dairy products such as yoghurt, cheese or butter have seen a 3% increase during the same time period (MAPA, 2024a).

When it comes to trade, meat and livestock product exports represent 18% of total agrifood exports in the country, reaching 20% when including milk and dairy (MINECO 2024). Exports reached 12 billion EUR in 2023, while imports were in the order of 3 billion EUR. Therefore, the trade balance for livestock products in Spain is positive (+9 billion EUR), being highest for the pig sector (+ 7 billion EUR), and smallest for poultry and eggs (123 million EUR). For dairy, the trade balance is negative (-963 billion), with most imports deriving from France and the Netherlands. Almost two-thirds of the exports, in value, are destined to EU countries, while in the case of imports, 93% of these originate within the EU.

8.3 The transition to cage-free farming for the pig sector in Spain

8.3.1 Key characteristics of the sector

Pigs account for almost half of the total LSU in the country (43.9%), making Spain the top EU producer with 34 million heads (26% of the total pig heads in the EU). Spain also hosts one quarter of the breeding sows (above 50 kg) in the EU, with 2.6 million sows in 2024, and one quarter of the piglets (10 million heads of an EU total of 40 million) (Eurostat). Spain slaughtered 53M pigs in 2024, the largest number among EU countries (Germany led the ranking until 2020), producing 4.8 M Tn of meat (MAPA 20024b).

The Spanish pig sector is considered to be highly intensive, and production is mostly integrated (74%¹¹⁸ of farms were part of large integrations in 2021 and the number seems to be increasing). Over the past decade, the total number of pig farms has been decreasing, in particular the smaller holdings, while the share of large holdings has increased by more than 35% (MAPA, 2024b).

In Spain, there are two main pig production types: the conventional white pig breeds and the Iberian. There are large differences between the two, including in productivity between the two groups, with an average of 29 piglets per sow per year in conventional white pig breeds, versus 17 for Iberian sows (Sanz-Fernandez et al. 2024). The Iberian breed represents around 6.5% of the market¹¹⁹, although they are not all reared in free-range systems. Overall, organic pig production remains marginal.

Use of cages in the sector

Crates - metal frames in which the sows are confined for a certain period, also referred to as "fixation" - have been common practice in pig breeding for many years. Confining the sows in the gestation area simplifies the insemination process and prevents fights that could jeopardise pregnancy, while the confinement in the farrowing area prevents them from accidentally crushing their piglets when lying down after birth.

Broadly, commercial pig farms use three types of systems, which differ in how they use individual crates and group housing. These are: **confined systems**, where sows remain in crates for a period of around two months per pregnancy, **semi-confined systems**, which increase group housing time and reduce the time spent in individual crates, and group housing, where sows are kept in groups at all times. The confined systems are known to represent a large majority of pig production in the country. **Group housing** is mostly, though not only, linked to organic farming. The organic farming regulation does not allow the use of cages, and sows are kept in groups and have access to outdoor space. **Semi-confined systems** provide more space and temporary freedom to sows during farrowing but still offer physical barriers to reduce piglet crushing. In these systems, the farrowing crate is closed around the most critical farrowing days, from one or two days before farrowing to three to five days post-farrowing (ref). There can also be

¹¹⁸ https://pigproducer.net/fileadmin/european-clubs/pigproducers/img/content/international_congress/epp_congress_may_2023_sevilla/presentations_2023_seville/1_Spanish_pig_production_model_Higuera.pdf

¹¹⁹ https://pigproducer.net/fileadmin/european-clubs/pigproducers/img/content/international_congress/epp_congress_may_2023_sevilla/presentations_2023_seville/1_Spanish_pig_production_model_Higuera.pdf

more bedding or enrichment and a defined creep area for piglets. In **confined (conventional) systems**, sows are kept in individual crates for at least five weeks during their gestation period four weeks after insemination and one week prior to farrowing. In farms with less than 10 sows, they can remain isolated during the whole gestation period. The majority¹²⁰ of sows in these systems are also placed in farrowing crates from a week before giving birth until the piglets are weaned, around 28 days later. This makes for a total of around two months spent in individual crates.

There is no minimum legal requirement for sow cages/crates sizes in Spain. The Spanish Government produced a [guideline](#) on how to design the different types of holdings in pig farms according to the requirements by the RD 1135/2002. Recent legislation (RD 809/2025) has reinforced requirements on environmental conditions (e.g. fibre-rich diets, access to enrichment materials) but has not changed the caging system for sows.

Organic farming, which requires animals to be cage-free, is still anecdotal in Spain when it comes to pig farming. In 2020, a total of 37k pigs were reared this way¹²¹, representing less than 0.01% of total pig heads in the country.

Demand drivers and trends in consumption

The annual consumption of pig meat in Spanish households has fluctuated over the past fifteen years between 18 and 23 kg/capita, with a peak in 2009 and a low in 2022 (MAPA 2024b). About half of the consumed pig meat is fresh, while the other half is transformed (cold cuts). The average annual consumption of fresh pigmeat in 2024 was 9.31 kg, which represents 30% of individually consumed fresh meat (all types included) (MAPA 2024a).

Trade in the pig sector

Spain is the number one exporter of pigmeat and products in the EU and globally (MINECO 2024) (although China is the largest producer worldwide with 57 MTn followed by the US with 12 Mt (MAPA 2024b)). The pig sector is not surprisingly a key export sector in Spain, with 13% of agrifood exports (while imports account only for 1.8%). It also leads exports in the meat sector with a share of 73%. Most exports go towards Italy, Portugal and France (MAPA 2024b).

¹²⁰ In 2016, 100% of sows were considered to be placed in farrowing crates during the farrowing period (https://pure.sruc.ac.uk/ws/portalfiles/portal/18780689/FFW_2016.pdf).

¹²¹ https://www.3tres3.com/latam/ultima-hora/espana-aumenta-la-produccion-porcina-ecologica_13345/

In terms of products, the majority of the exports, both in weight and value, are of fresh/refrigerated meat as well as frozen meat (~33% each), followed by carcasses (17% of weight and 9% of value). Live animals represent 3.8% of the total exported weight and 2% of the value. Between 1.5M and 3M live pigs enter Spain annually (2012-2025), while 1M leave Spain – most to go to Portugal (MAPA, 2025a).

8.3.2 Barriers and enablers to the implementation of a cage-free transition for pigs in Spain

The pig sector plays an important role in Spain's agricultural output. The sector comprises over 2.5 million sows, the majority of which are housed in individual cages for up to five weeks during the gestational period and 28 days during farrowing, as allowed by current legislation. The individual caging system has allowed farmers to closely control and monitor each sow's feed intake, health status and reproductive performance, and kept piglets from being injured or crushed. It has also allowed for higher sow densities, given that more animals can be kept in a given farm building. However, cages restrict the movement of sows, increasing stress and frustration and can reduce the capacity of sows to express natural behaviours such as foraging or socially interacting (EFSA AHAW Panel, 2022).

The Spanish **legislation** does not go beyond EU requirements when it comes to the implementation of cage-free farming systems in pig production. A new Royal Decree (RD 809/2025), which came as a response to the animal welfare audits brought up in the European Parliament in 2017¹²², has not introduced new obligations for the housing of sows.

A transition towards cage-free farming would require existing farms to either reduce their current production levels or make large investments to meet new space requirements. Given the large size of the sector in the country, the costs foreseen to adapt existing farms are very high, up to 1.5-1.7 billion EUR, and there are no known financing instruments in the country that could support this. Regulatory uncertainty in relation to the minimum space requirements for sows kept in groups in future regulation is perceived as a key barrier towards change and future investments.

It has been shown that the change that the Royal Decree 1135/2002 brought about, reducing the time spent by pregnant sows in gestational crates, did not reduce the productivity of the sector, despite initial concerns. Improvements in

¹²² https://www.europarl.europa.eu/doceo/document/E-9-2020-006235-ASW_EN.html

genetics and management have been reported to drive a productivity increase during that time (Sanz-Fernandez et al. 2024).

Farms implementing fully cage-free farming systems are limited in the country and include both organic and non-organic farms. Key issues remain to be solved before other farms transition, including the management of piglet injury and mortality during farrowing (Malak-Rawlikowska, 2024). Addressing the changes in farm management required to transition to group housing, as well as the large investments required to adapt existing farms, the higher labour inputs and the need for training will be crucial to bring about these changes in the sector.

The CAP could steer change in the sector. However, support for cage-free farming remains limited. An ENVCLIM intervention in the Spanish CAP Strategic Plan, aiming to improve animal welfare in livestock farming (intervention 6504), allows Autonomous Communities to compensate pig farmers for costs and income forgone resulting from commitments made towards cage-free farrowing (allowing for sows to be caged for the first week after birth at maximum). However, the commitments have only been programmed by two Autonomous Communities (Balearic Islands and Castile and León, reducing its overall impact.

Spain has at least two well-established and implemented **animal welfare seals** in the pig sector, the IAWS/B+ and the Welfair Certificate. These could play a role in assessing the welfare of a transition to cage-free farming. Only the industry-led IAWS/B+ seal currently includes cage-free farms in their different farm typologies, although the seal does not seek to promote ideal housing systems but rather set performance and management criteria that apply across all types. Overall, **consumer awareness** is limited when it comes to animal welfare in pig farms and does not act as a pull leading to changes in sow conditions. A survey from Euroconsumers concluded that 42% of Spanish consumers were not willing to pay more for animal welfare-friendly food.

The table below summarises some of the key barriers and enabling factors playing a role in a transition towards cage-free farming systems.

Table 12: Barriers and enablers for the transition to cage-free animal farming in Spain's pig sector

Barriers and enablers
Regulatory and policies
The conditions under which pigs are kept in farms are regulated through the Royal Decree 809/2025, modifying the existing RD 1135/2002 on minimum standards for the protection of pigs (conditions for pregnant and farrowing sows specified in Article 3, points 3 and 4). RD 1135/2002 allows sows to be isolated for the first 4 weeks following insemination, and one week before farrowing. The text refers to the sows being “isolated” but still able to “easily turn

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around". Holdings with less than 10 sows can keep them in isolation during the whole gestation period. The rest of the time, sows must be kept in groups in a space larger than 2.8m * 2.4m when there are less than 6 animals together. There are no requirements regarding the size of the farrowing cages, where sows remain with piglets up to four weeks.

A new Royal Decree from 2023 (RD 159/2023) introduced new requirements in terms of space and floor conditions for suckling piglets and overall increased floor space for production pigs. The minimum surface for pregnant sows in groups remains unchanged. The holdings were given two years to adapt to the new requirements, but a one-year derogation has been given to the sector. Farmer organisations ASAJA and COAG have asked the Ministry for a 3-year derogation (until 2028) of RD 159/2023 to avoid a "drastic decrease" in production and allow for an "organised transition".

In addition, the RD 306/2020 establishes specific rules for intensive pig farms. Since June 2025, pig holdings with more than 5.1 LSU must have an "Integrated farm management system", among other things, it must have a training plan for animal welfare.

Funding instruments

Within the Spanish CAP Strategic Plan, ENVCLIM intervention on 'Animal Health and Welfare Commitments' (6504) is the only one that explicitly mentions supporting cage-free farrowing. The intervention allows Autonomous Communities to compensate pig farmers for costs and income forgone resulting from commitments made towards 'open' farrowing (allowing for sows to be caged for the first week after birth at maximum). Two Autonomous Communities programmed this, the Balearic Islands and Castile and León, supporting farmers with 51 EUR/LSU. Also in the Strategic Plan, and while not directly supporting cage-free farming, INVEST measure 'Aid for productive investments on agricultural holdings contributing to climate change mitigation-adaptation, efficient use of natural resources and animal welfare' (6841.1), allows the co-financing of investments that improve animal welfare. An increase in the area available per head of livestock is cited as an example, which could also support farmers in the transition towards cage-free farming. It is also up to each Autonomous Community to decide on the type of granted support (type of payment, percentage of total support over eligible costs).

Costs

The pig industry estimates that new rules requiring the removal of cages for sows could cost the sector 1.5-1.7 billion EUR in investments¹²³, communicated by the sector). Adapting existing farms to the new regulatory requirements would represent a large challenge for the sector. For individual farms, investments could be around 300k per farm to reduce livestock densities, or 500k if the same level of production is kept (and total farm area is increased)¹²⁴ and could lead to a price increase of 20% for consumers¹²⁵.

Since the entry into force of RD1135/2002 and Directive 2008/120/EC, the transition of gestating sows from full confinement in individual stalls to group-housing systems after the first four weeks of gestation increased the costs for the sector and individual farms. The cost

¹²³ https://www.segre.com/es/economia/231116/eliminar-jaulas-tiene-un-coste-de-220-millones-para-el-porcino-de-lleida_250066.html

¹²⁴ <https://efeagro.com/granja-porcino-bienestar-animal/>

¹²⁵ <https://www.europapress.es/epagro/noticia-ganaderia-ganaderos-estiman-normativa-acabar-jaulas-encarecera-20-huevos-hara-inviable-porcino-20210611144925.html>

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per sow place in new constructions varied depending on the level of the modification and the technology adopted. Basic adaptation costs for existing units ranged between 50-300 EUR per sow; this required farms to reduce numbers (several did by 5-50% during renovation). For farms that wanted to maintain the same capacity, the construction of the new gestational places ranged between 150-350 per sow (DARPAMN, 2012). For new facilities, costs ranged from 430 EUR/sow (pens with conventional feeders) to 723 EUR/sow (free-access stalls). In terms of productivity, there is a documented risk of lower efficiency during the transition period with reduced farrowing rates (DARPAMN 2012). On the whole, though, Spain, the average weaned piglets per sow per year raised from 23 to 29 between 2009 to 2023, which was driven by genetics and improved management (Sanz-Fernandez et al. 2024). However, it remains uncertain whether productivity rates would further increase.

A key uncertainty for the sector remains the choice of minimum space requirements for sows if a cage-free legislation is implemented. Given the large investments that the farms will need to make, a stable regulatory framework is seen as fundamental (interview with stakeholders). In addition to the costs related to investments for adaptation, training and advice are seen as key for the success of group housing in the pig sector.

Demand side measures

According to a survey from Euroconsumers, 42% of Spanish consumers said they were not willing to pay more for animal welfare-friendly food¹²⁶. Several seals and certification systems exist in Spain, originating within the industry, researchers and retail. The Spanish inter-professional body for the conventional white-pork sector (INTERPORC) delivers a seal called "IAWS/B+"¹²⁷ which aims to create a benchmark across the white-pork chain, taking into account the animal welfare principles established by the World Organisation for Animal Health. Among other things, it guarantees space and mandatory minimum surfaces to be made available to pigs according to, and going beyond, regulation, and classifies farms into three main typologies, two of which (2&3) keep sows in groups during gestation as well as farrowing, while the requirements of the remaining one (1) are very similar to the legal obligations. Typology 3 is more demanding in terms of space allocation and access to the outside than typology 2. The seal is used by several retail own brands to promote their products: Alcampo, Consum, Aldi, El Corte Ingles. It's a voluntary seal and has its own scientific and technical committee. Note that the seal is not limited to the farm, but traces each pig through the full supply chain (farm, transport, slaughter, industry and marketing).

There is another animal welfare seal in the country which also applies to pig farms (as well as to other livestock farms), the Welfair Certificate¹²⁸, based on the Welfair protocol. This is also a private scheme with annual audits based on direct observation of animals and criteria defined by Welfair, focusing on farm and slaughterhouse animals. Welfair was developed through a collaboration between the Institute of Agrifood Research and Technologies (IRTA, Catalonia) and the Basque Institute of Agricultural Research and Development (NEIKER), supported by two EU funded projects *Welfare Quality* and *AWIN*. In terms of cage use, the seal does not explicitly require or promote cage-free farming systems.

¹²⁶ <https://www.euroconsumers.org/consumers-want-higher-animal-welfare-standards/>

¹²⁷ Technical guidelines can be found here: [https://s6f531706a66c47d2jimcontent.com/download/version/1701352342/module/14775656729/name/Anexo 1A-Reglamento T%C3%A9cnico IAWS GeneralidadesPorcino. Rev 8.pdf](https://s6f531706a66c47d2jimcontent.com/download/version/1701352342/module/14775656729/name/Anexo%201A-Reglamento%20IAWS%20GeneralidadesPorcino.%20Rev%208.pdf)

¹²⁸ <https://animalwelfair.com/en/>

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Animal welfare and health

According to the EFSA AHAW Panel (2022), the removal of **gestational cages** is unavoidable to improve sows' welfare. However, new risks can arise from keeping sows in groups, such as managing aggression between sows as well as practical aspects such as heat detection or reproduction, which become more complex (Spoolder et al. 2009). These require training for staff. When in groups, behaviours such as aggression and injuries can become more common and must be dealt with. The monitoring of the individual sows in relation to fertility or their pregnancy status also becomes more difficult. There are fears of reducing the productivity of the farms if the management is not done properly. According to EFSA (2022) the welfare issues which can arise when keeping sows in groups can be mitigated by good pen design, good feeding and group mixing.

Alternative **farrowing systems** in Spain include those with temporary confinement, zero confinement and group housing ([reference](#)). Temporary confinement systems can have a detrimental effect on the sow's welfare, according to (EFSA¹²⁹, [Goumon et al. 2022](#)). While there are farms implementing group housing systems (organic farms as well as those certified by the B+ seal under typologies 2 and 3), the level of adoption in the country is not known. Compared to individual crates, the alternatives present management challenges which need to be addressed, mostly in relation to avoiding piglet crushing. Heat stress also seems to be an important factor to take into account in these alternative systems in hot areas, in particular in organic systems where pigs have outdoor access. In relation to one of the main concerns, piglet crushing, a 2022 study in Spanish farms demonstrated that farrowing systems with reduced confinement can have welfare benefits for piglets (reduced stress) without compromising piglet performance or injury due to aggression ([Ko et al. 2022](#)), but require a good level of management. In semi-confined systems, advances in the predictability of birthing could also help to minimise the amount of time that the sow remains in the crate. EFSA (2022) suggests a minimum period of 6 months for staff and animals to adapt when transitioning from crates to pens.

Research, projects, and innovation

From a literature search, more research seems to have gone into alternatives for farrowing crates than gestation crates in the country. A successful transition will require that innovations developed in research settings can be successfully adopted on farms. R&I projects should emphasise the applicability and farm validation to ensure that technologies or management tools that perform well in experimental conditions can be implemented in real production environments, taking into account operational, knowledge, and labour-related constraints. The EU funded project "[Welfarmers](#)" is exploring opportunities and solutions for loose housing of lactating sows. It selects farms implementing best practices to look for practicable and replicable solutions (see [top 5 best practices for banning cages](#)).

¹²⁹ <https://www.efsa.europa.eu/en/infographics/welfare-pigs-farm>

8.4 The transition to cage-free farming for the rabbit sector in Spain

8.4.1 Key characteristics of the sector

Spain is the largest producer of rabbit meat in the EU. The country had around 4 million rabbit heads in 2024, making it the top producer in the EU¹³⁰ and slaughtered about 27 million rabbits in 2024, producing 33k tonnes of meat (MAPA 2025b). The rate of self-sufficiency is 113% (MAPA, 2025b). In 2024, there were around 3264 holdings with rabbits. However, only about 1100 of these are considered productive and have a total of 3.8 million rabbits, while the rest are for own consumption (MAPA, 2025b). The size of rabbit farms has changed over the last decade, with larger rabbit farms having a larger presence (>1000 does) (Norton et al. 2025). The production of rabbit meat is declining, and between 2008-2025 it dropped by 45% (MAPA, 2025b).

The total value of rabbit production in 2020 was 173M EUR (0.8% of the total livestock value). There are territorial differences in the production of rabbits. Catalonia has the largest number of holdings (29%), but they are of smaller size (less than 400 does and family owned. It's followed by Castilla y León (13%) and Galicia (12%), which concentrate the largest rabbit farms (over 800 does) (MAPA, 2025b).

Use of cages and animal welfare in the sector

Cage-free systems remain virtually absent in commercial rabbit production (beyond a few organic farms) and most farms continue to use conventional wire cages arranged in rows within enclosed pavilions (Dalmau et al. 2020, Botelho et al. 2020) and with plastic slat flooring (MAPA 2022). In terms of usage, 34% are fattening cages while 23% are nesting cages and 20% can serve both purposes. Housing systems therefore remain very restrictive, often below 0.35m² per doe and with limited cage height and environmental enrichment. The improvements in the housing systems have focused on increased space, comfort and the introduction of some enrichment (Dalmau et al. 2020, Botelho et al. 2020). There are currently no well-defined housing alternatives for rabbits, compared to other sectors (Norton et al. 2025). While organic production of rabbit meat does not allow the use of cages, this type of production system represents only 2% of all farms (MAPA 2022). According to researchers contacted for this report, rabbit mortality is still an issue in cage-free systems such as organic farming, although no public data exists.

¹³⁰ <https://intercun.org/sector-cunicola/sector-cunicola-espanol/>

Demand drivers and trends in consumption

The consumption of rabbit meat is decreasing in Spain. The average consumption of rabbit meat is 0.55 kg per year. Spanish homes spend on average 0.1% of their food budget on this type of meat. The profile of rabbit meat consumers in Spain is that of retired people, adult couples without children and couples with older children. Lower-income households consume higher amounts of rabbit (1.1 kg per year) than higher income ones (0.4 kg per year) (MAPA, 2024a).

Trade data

The trade balance of the rabbit sector in Spain has traditionally been positive (MAPA 2025b). Imports are almost negligible (2.6 Tn) while exports amounted to 6677 Tn in 2024. One third of exports are directed to Portugal, while 15% were are directed to Poland (2025b).

8.4.2 Barriers and enablers to the implementation of a cage-free transition for Rabbits in Spain

Despite rabbits accounting for a small share of total livestock heads and meat production in Spain, the country is the largest producer of rabbit meat in the EU. It is interesting to note that two-thirds of rabbit holdings in Spain rear rabbits for own consumption. In commercial farms, rabbits are reared in farms under three main types of systems: conventional, integrated production and organic farming. There is no specific legislation to protect rabbits, either at national or European level, but organic farming and integrated production have their own guidelines.

The large majority of rabbits in Spain are kept in conventional systems. These have an obligation to provide rabbits with the amount of space needed for their physiological needs, but there are no specifications on what this means in practice. Rabbits remain one of the least studied species in terms of animal welfare, and further research is needed to develop alternatives to cage systems, in order to ensure the welfare of does (EFSA, 2020).

There are no public studies on the costs of a transition towards cage-free farming for the Spanish rabbit sector. Given that it is a small sector considered important for the vitality of rural areas, it is not unrealistic to consider that the Government could provide some support for a transition towards cage-free farming were it to be required by law (interview with stakeholder).

There is also no specific sectoral support through the Spanish CAP Strategic Plan. Some rabbit farmers receive support through other types of interventions targeting other livestock groups or arable farming.

Table 13: Barriers and enablers for the transition to cage-free animal farming in Spain's rabbit sector

Barriers and enablers
Regulatory and policies The use of cages in the Spanish rabbit sector is regulated through the EU Directive for the protection of animals kept for farming purposes (98/58/EC), transposed in Spain through the Royal Decree 348/2000. There are three aspects of animal welfare contemplated in current legislation: protection during transport, protection during slaughter and protection on the farm. On the last aspect, legislation is still being produced¹³¹. In 2021, the EC announced a legislative proposal by 2023 to ban cages by 2027 for several sectors, rabbits included. However, this has been postponed, and no date has been communicated for when this potential proposal could be published. Rabbit farms can be classified into three types: conventional farms, integrated farms and farms under organic production. The number of organic rabbit farms in Spain is very low, they have high running costs, particularly in terms of feed, and keeping rabbits in groups remains a challenge. For conventional farms and integrated farms, there is an obligation to provide rabbits with the amount of space needed for their physiological needs, but there are no specifications on what this means in practice. Each Autonomous Community publishes the technical requirements for rabbit production in "integrated" farms. As an example, Andalucía requires that special attention to animal welfare must be given and rabbit production is limited to a number of rabbit breeds. In the case of Navarra, integrated farms are also obliged to produce rabbits of specific breeds, holdings are limited to 4000 does and must be "family" run. There is also a limit of 27 rabbits per square meter. In the case of organic farming (Regulation 848/2018), animals must be kept on the ground and be given permanent outdoor access (pasture) (provided meteorological conditions allow). Rabbits can also be kept in mobile housing systems outdoors. Keeping animals must also be kept in groups, with some exceptions related to disease or security reasons allowing isolation. Minimum housing space for rabbits are 2 m² for does, 0.2 m² for "fattening" and 0.5 m² for "replacement (EEC 2092/91)". For reproduction doves, the maximum number of animals kept per hectare is 100 (to keep within the 170kg N/ha/yr limits)¹³².
Funding instruments The Spanish CAP Strategic Plan does not target support for rabbit farming. However, a number of rabbit farms receive support from the CAP through other measures, notably income support and schemes targeting arable farming or other livestock farming types. The Spanish Government estimated that between 2017-2019 one third of the productive rabbit holdings received CAP support (MAPA 2020).
Costs There are no published costs for the removal of rabbit cages in Spanish farms. Costs will also depend on changes in the productivity of does (does give birth to around 40 rabbits per year) and mortality rates.

¹³¹https://www.mapa.gob.es/ministerio/pags/Biblioteca/Revistas/pdf_CUNI%2FCUNI_2002_120_completa.pdf

¹³² <https://laadministraciondiala.inap.es/noticia.asp?id=1155103>

Barriers and enablers**Demand side measures**

The rabbit professional sector association (INTERCUN) has its own animal welfare commitment (B+)¹³³- BACI. It focuses on ensuring minimal acceptable housing conditions and provides a benchmark for improving housing.

The [Welfair](#) certification system also includes rabbit farming. The protocol to assess the welfare of does and kits (baby rabbits) can be accessed [here](#). It provides four principles to assess animal welfare. Housing requirements are one of the criteria and relate to the comfort around resting, thermal comfort and ease of movement. For the latter, the height of the cage is assessed together with the stocking density - based on the cm² of free space per animal - and free movement is defined as the capacity to hop, jump and turn of each animal. An audit of thirty Spanish farms based on this certification system resulted in 50% of the farms classifying as excellent (85-100) for the housing criterion, while 20% received a score below 45 (Dalmau et al. 2020). Low height of the cages was a recurrent issue, with most farms (60%) opting for the minimum height (32 cm) or not achieving it (10%).

Animal welfare and health

Rabbits remain one of the least studied species in terms of animal welfare (EFSA 2005). The EFSA (2020) acknowledged that conventional cages likely lead to lower welfare for does due to behavioural restrictions. They also concluded that floor pens, outdoor and organic systems provide better behavioural welfare but can pose health problems (associated to aggression and lesions). The overall welfare score for organic systems reported by EFSA (2020) is the lowest among all considered housing systems.

Mortality rate in rabbit farms varies according to the sources and ranges between 2%-6% for reproductive does, and between 5-7% for young rabbits¹³⁴ (Rosell and de la Fuente 2016). It is difficult to find numbers comparing organic farms (keeping does in groups) with conventional ones.

Research, projects, and innovation

The [PARCCUN project](#), funded by the Government of Catalonia and the EAFRD aimed to create a new "park" as an alternative to cage farming for rabbits and analyse its impact on animal welfare and farmer costs. The project showed that both animal welfare and productivity declined after removing the individual cages, suggesting that this is not a viable alternative to single-cage farming.

¹³³ The internal regulation can be found here: <https://intercun.org/wp-content/uploads/2025/01/Reglamento-Tecnico-BIENESTAR-ANIMAL-BACI.pdf>

¹³⁴ From an industry blog post: <https://cunicultura.info/el-sector-cunicola-a-examen>

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9. ANNEX 3 - GERMANY

9.1 Key characteristics of the livestock sector

Livestock production in Germany was estimated at 36.013 billion EUR in 2024 – almost half of the country’s total annual agricultural production value of 75.486 billion EUR, and over 20% of the EU’s total livestock production value (Eurostat, 2025). Out of 255,010 agricultural holdings in Germany, 144,780 kept livestock in 2023 (Eurostat, n.d.). The total number of agricultural animals kept in German farms in 2024 was over 200 million. Three animal species have a dominant role in the German livestock sector: cattle, pigs, and poultry. In comparison with other EU Member States, Germany is the second biggest producer in both cattle and pigs, and the fourth biggest producer of poultry (Eurostat, n.d.).

Table 14: Livestock numbers in Germany and share in EU livestock total

	Cattle	Pig	Poultry
Number of heads / LSU	10,641,290 heads in 2024	21,292,300 heads in 2024	1,900,000 LSU in 2023
Share of total LSU	52.5%	33.5%	12.6%
EU number of heads / LSU	71,896,320 heads in 2024	132,135,520 heads in 2024	19,597,160 LSU in 2020
Share of EU total	14.5% of EU heads in 2024	16.1% of EU heads in 2024	10.2% of EU LSU in 2020
Number of heads / LSU	2 nd in heads in 2024	2 nd in heads in 2024	5 th in LSU in 2020

Source: [Eurostat](#) and [CAP context indicators](#)

A significant share of the livestock production in Germany is concentrated in the North-West, especially in North Rhine-Westphalia and Lower Saxony. For instance, half of all laying hens in Germany¹³⁵ and 60 % of the total population of pigs are kept in these two federal states (Länder).

Emissions from livestock farming accounted for 69.5 % of agricultural emissions in Germany in 2022, with methane emissions playing a central role¹³⁶. The sector also has a significant impact on water pollution. Ammonia (NH₃) emissions from manure management accounted for 42.4% of total agricultural NH₃ emissions in Germany in 2022¹³⁷. Intensive livestock regions (e.g. the “pig belt” around

¹³⁵ https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/03/PD25_097_413.html

¹³⁶ <https://www.ressortforschtklima.de/en/participating-projects/reduction-of-greenhouse-gas-emissions-in-livestock-farming>

¹³⁷ https://iir.umweltbundesamt.de/2023/sector/agriculture/manure_management/start?utm

Oldenburg and Münsterland) are particularly prone to nitrate pollution in groundwater (Heinrich-Böll, 2025).

9.2 Consumption and trade related to animal products in Germany

Overall, the per-capita meat consumption in Germany has decreased over the past decades: while the average in 2018 was still 61.1 kg per person, consumption declined to 53.2 kg in 2024, due to a general shift in dietary habits. In 2024, meat consumption in Germany is slightly higher than in the previous year, though: it rose by 0.8 percent compared to 2023¹³⁸.

Pork has accounted for the largest share, with 28.4 kg per capita, followed by poultry meat (13.6 kg per person), and beef and veal at 9.3 kilograms per person. In total, meat consumption amounted to 4.44 million tonnes in 2024¹³⁹.

Egg consumption has remained relatively stable since 2000 and amounted to about 19.3 billion eggs in 2022 (Thobe & Koch, 2024). Recently, per capita egg consumption in Germany reached a new high of 249 eggs in 2024, according to preliminary figures from the BLE (Federal Office for Agriculture and Food).

9.3 The transition to cage-free farming for the pig sector in Germany

9.3.1 Key characteristics of the sector

Pork production makes up the **largest share of German meat production**: in the first half of 2025, it accounted for 63 % of total meat produced – equivalent to **4.3 million tons of pork per year**.¹⁴⁰

In Germany, **15,250 farms** keep a total number of **20.9 million** pigs as of 2025.¹⁴¹ When focusing on sows kept for piglet production, the number amounts to **1.4 million breeding sows** - being kept **by 4,890 farms** (BMEL, 2025).

Over the past ten years, there has been a **significant decrease in the pig population, and an even greater decline in the number of farms keeping pigs**: the total number of pigs farmed has shrunken by a quarter, i.e., 7.2 million animals. Since the number of farms with pig husbandry decreased even more

¹³⁸ <https://de.statista.com/infografik/21790/pro-kopf-konsum-von-fleischsorten-in-deutschland/>

¹³⁹ https://www.ble.de/SharedDocs/Pressemitteilungen/DE/2025/250327_Fleischbilanz.html

¹⁴⁰ https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/08/PD25_290_413.html

¹⁴¹ https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/07/PD25_238_413.html

sharply - by 47 percent – there has been a trend toward larger farms: in May 2025, farms kept an average of 1,400 pigs each.¹⁴²

For sow farming, the decrease has been even more pronounced: the number of sows kept decreasing by over 30 percent, and the number of farms keeping sows shrank by over 50 percent in the past ten years (BMEL, 2025). As of 2025, most pigs were kept in **Lower Saxony, followed by North Rhine-Westphalia** – together these regions account for about 60 % of the total population.

Demand drivers and trends in consumption

The per capita consumption of pork in 2024 was about 28.4 kg per person – resulting in a total of about 2.37 million tons. It has decreased over the last decade by almost 10 kg – from 37 kg per person in 2014 to only 28.4 kg in 2024¹⁴³.

Use of cages in the sector

To differentiate **housing systems for pigs**, the voluntary, five-tier animal husbandry label 'Haltungsform' is referenced most often. It does not consider the use of crates in sow farming, though, as it only indicates housing conditions for fattening pigs; however, the highest levels (Haltungsform level 5, formerly level 4) indicate organic production where the use of crates is prohibited.

While there is **no exact data available on the share of sows being exposed to the use of crates**, a 2019 survey by Greenpeace showed that nearly 90 percent of pork products sold under German supermarket private-label brands were produced according to the lowest level (level 1), which is equivalent to the regulatory minimum. A more recent consumer survey from 2023 by the Society for the Promotion of Animal Welfare in Livestock Farming reports that around 90 percent of consumers chose pork products categorized as 'housing level 2' (Gesellschaft zur Förderung des Tierwohls in der Nutztierhaltung, 2025).

These survey results can only serve as a proxy but they clearly indicate that the **vast majority, and certainly more than 90 percent of the 1.4 million sows** used for breeding in Germany are still repeatedly **confined in gestation crates or farrowing crates**¹⁴⁴.

¹⁴² https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/07/PD25_238_413.html

¹⁴³ <https://www.ble.de/DE/BZL/Daten-Berichte/Fleisch/fleisch.html?nn=622880#doc622926bodyText1>

¹⁴⁴ <https://animalequality.de/blog/alles-ueber-kastenstaende/>

Gestation crates usually measure 200 x 65-70 cm, and farrowing crates 250 x 70 cm (Bundesanstalt für Landwirtschaft und Ernährung, 2021). In both cases, the width is not sufficient to turn around, and sows often touch the neighbouring sow with their legs when lying down. The permanent restriction of movement can cause behavioural disorders and injuries and keeps sows from freely contacting their piglets¹⁴⁵.

The animals usually spend about five weeks in gestation crates (five days before insemination and around four to five weeks after), and five weeks in farrowing crates (about one week before and until four weeks after giving birth). Between the fixation in the service areas and the confinement in the farrowing area, the sows spend about 80 days in group housing. (Bundesanstalt für Landwirtschaft und Ernährung, 2021). This means that throughout the year, **sows are, on average, being confined for 5 months per year**¹⁴⁶.

Trade in the pig sector

Even though Germany produces more pork than it consumes, with a **self-sufficiency rate of around 135 percent**, approximately **942,000 tons are imported** annually (as of 2024), mainly high-quality cuts from Belgium, Denmark, and the Netherlands. On the other, hand, Germany **also exports large quantities of pork**: more than half of the domestic production - **2.2 million tons** in 2024 – are mainly exported to Asian countries. These are mainly cuts that are less favoured by German consumers such as pig's feet, snouts, tails, etc.¹⁴⁷

With regard to piglet production, **imports of live piglets** play an important role as well. In 2019, 11.4 million piglets were imported to Germany (semi-annual estimates for 2023 and 2024 suggests similar numbers) - around 20 percent of the pigs fattened in Germany. The largest share was accounted for by imports from Denmark (6.3 million) and the Netherlands (5.1 million), (Borchert et al., 2021).

¹⁴⁵ <https://www.expertiseforanimals.com/informationen-artikel-en/pigs-in-agriculture>

¹⁴⁶ <https://animalequality.de/blog/alles-ueber-kastenstaende/>

¹⁴⁷ <https://www.landwirtschaft.de/wirtschaft/agrarmaerkte/markt-und-versorgung/warum-importiert-deutschland-so-viel-schweinefleisch>

Table 15: Key characteristics of the pig sector in Germany

	Animals kept	20.9 million, of which 1.4 million sows
Production	Production p.a.	4.3 million tons of pork
	Number of farms	15,250 in total, of which 4,890 keep sows
	Regional concentration	Lower Saxony and North Rhine-Westphalia
Consumption	Annual domestic consumption	2.37 million tons of pork meat
Use of cages	Share of animals kept in cages	> 90% of sows for ~ 5 months per year
	Types of cages used	Gestation crates and farrowing crates of 200-250 x 65-70 cm
Trade	Imports p.a.	942,000 tons of pork meat
	Exports p.a.	2.2 million tons
	Key trade partners	Belgium, Denmark, and the Netherlands for imports

9.3.2 Barriers and enablers to the implementation of a cage-free transition for pigs in Germany

Pork is both the most-consumed and most-produced type of meat in Germany, but the pig sector has seen a significant decline in the number of domestic farms keeping pigs, including sows. Over 90 percent of sows used for breeding in Germany are still repeatedly confined in gestation crates or farrowing crates for a total of 5 months or longer per year. This common practice of sow 'fixation' in crates is being gradually banned in Germany through the 2021 revision of the German Animal Welfare Livestock Husbandry Ordinance: By 2029, gestation crates will be completely phased out, and by 2036, confinement in farrowing crates will be limited to a maximum of five days.

Successful litigation by the state governments of German federal states (*Länder*) before the Federal Constitutional Court that challenged the common practices as being incompatible with existing federal law has been a key contributing factor for the change in legislation (the so-called *Magdeburg ruling* in 2015). Public attention due to a case of serious animal welfare violations at a large sow farm that was covered by the German press in 2016 also helped increase awareness (interview with research institute).

However, the implementation is progressing rather slowly. Current labelling is insufficient to inform consumers about the use of crates in production. Neither the widely used voluntary label 'Haltungsform' nor the new, mandatory animal husbandry label for pork (for which the entry into force has been postponed)

considers sow husbandry and animals' rearing stages¹⁴⁸. Consumer choices and industry commitments therefore play a smaller role.

On the farmers' end, the conversion of sow stables comes with significant financial challenges, as compliance with the upcoming regulation requires substantial conversion measures in the insemination centre and farrowing pens. The EUR 1 billion budget of the federal funding programme to promote the conversion of animal husbandry is being deemed insufficient for investment support by various stakeholders who calculated significantly higher financial requirements¹⁴⁹.

What is more, the Federal public funding programme for the transition has offered farms insufficient planning certainty: the program design was considered unattractive since funding for ongoing additional expenses relies on annual funding decisions depending on the public budget, lacking a reliable and long-term planning horizon for many farmers. (Kompetenznetzwerk Nutztierhaltung, 2023). Moreover, the funding program is being discontinued early – with the official justification that uptake was too slow, but stakeholders assume that driving factors have been the German Government's current budget restraints and the shift of the political climate after the new administration took charge in early 2025 (interview with research institute).

Another hurdle is that investment support under the program has required that a building permit has been granted already– the process for which is lengthy. In addition, regulatory hurdles under the German building law - which was amended correspondingly at the end of 2023 - made obtaining approval for the conversion of certain barns to alternative housing systems tricky and prevented a portion of operators from converting their facilities¹⁵⁰.

Due to the high investment costs, many sow farmers are uncertain whether they will exit sow husbandry instead of implementing the requirements, as a recent industry association survey shows¹⁵¹. This would further reduce the number of domestic farms keeping sows and increase the number of live piglets imported for fattening (currently standing at 20 percent). An even higher share of imports from other EU Member States, of course, implies a certain 'outsourcing' of the

¹⁴⁸ <https://zdfheute-stories-scroll.zdf.de/tierhaltungskennzeichnungsgesetz-schwein-fleisch-label/index.html>

¹⁴⁹ <https://www.dgs-magazin.de/aktuelles/news/article-7863499-4627/umbau-der-tierhaltung-foerderprogramm-gestartet-.html>

¹⁵⁰ <https://www.bmlh.de/DE/themen/tiere/tierschutz/tierhaltungskennzeichnung/anpassung-baurecht.html>

¹⁵¹ <https://www.schweine.net/news/foerdergeld-fuer-stallumbau-so-koennen-sauenhalter.html>

problem, as these piglets might have been reared on farms where crates are still common use.

Interviewees considered the requirements under EU state aid regulations that prohibit domestic public funding after a certain regulation enters into force as a general barrier for supporting the transition to cage-free sow farming. This puts farmers in countries that opt for an early implementation of legal improvements at a disadvantage compared to their competitors in the EU (interview research institute).

Table 16: Barriers and enablers for the transition to cage-free animal farming in Germany's pig sector

Barriers and enablers
Regulatory and policies In 2021, the legislator revised the Animal Welfare Livestock Husbandry Ordinance (Tierschutz-Nutztierhaltungs-Verordnung), introducing new rules for the keeping of sows, and gradually banning the use of farrowing crates and insemination crates. For newly built farms, the new regulations apply immediately (as well as for farms that are undergoing renovation), while all other farms are granted a multi-year transition. From 2029 onwards, crates must be completely phased out in the service area, and animals may only be restrained for short periods of time, such as for the process of insemination or veterinary examinations. For the transition period until 2029, the amended regulation stipulates that crates need to allow sows to stretch freely when lying on their side "without coming into contact with any structural obstacles", but tolerating that their legs might touch the neighbouring sow while lying on their side (Bundesanstalt für Landwirtschaft und Ernährung, 2021). In the farrowing area, confinement will only be permitted for a maximum of five days (instead of 35 days) around the time of birth, and this requirement must be fully implemented by 2035 at the latest. (Bundesanstalt für Landwirtschaft und Ernährung, 2021). Legal developments preceding the ban included a 2015 court ruling of the Federal Constitutional Court (the so-called <i>Magdeburg ruling</i>), as a response to legal action by the state government of North Rhine-Westphalia. The ruling already clarified that the commonly used form of sow housing in the service area was in fact not legally permissible because according to the Animal Welfare Livestock Husbandry Ordinance, crates had to be designed in such a way that the sow can stretch its head and limbs freely when lying on its side. On most farms, however, this was not the case. The court ruling inspired intense political debates between the Federal Ministry of Food and Agriculture (BMEL), the federal states (Bundesländer), and industry and farming associations over how to revise the Ordinance, with disagreements centring on design standards and how quickly to phase out the old crates. In addition, legal proceedings and photos of serious animal welfare violations at a large sow farm made the news in 2026, which generated public attention towards the issue (Interview with research institute). After prolonged debate, the Federal Council (Bundesrat) adopted a compromise amendment in July 2020, effective since 2021, which restricts the use of crates to a few days and requires conversion to group housing, as described above. (Bundesanstalt für Landwirtschaft und Ernährung, 2021).

Barriers and enablers**Funding instruments**

Traditionally, the Agricultural Investment Support Programme (AFP) is Germany's central programme for supporting investments in agricultural holdings. Under this programme, particularly high levels of funding can be granted under the AFP if the investor meets the 'structural requirements for particularly animal-friendly housing' when constructing livestock buildings (Deutscher Bundestag, 2007).

Federal subsidy programme for welfare-friendly pig housing

While there had already been a €300 million support program dedicated to sow-farming in 2020, the newest public funding programme focusing on pig farming is the 'Federal programme for the conversion of livestock farming' (Bundesprogramm zum Umbau der landwirtschaftlichen Tierhaltung), which was developed in the context of the recommendations by the 'Borchert Commission' and launched in 2024.

Farmers can receive funding for the construction or conversion of pig housing, which must be designed to ensure animal welfare and environmental compatibility. The programme explicitly also targets the implementation of new regulations in sow farming that phases out crates. Consequently, the requirements of the new Animal Welfare Livestock Regulation apply as a basis.

The government allocated a total budget of 1 billion € to this programme - 875 million € for the time period 2024–2027, plus 125 million € in future commitments¹⁵². However, the programme will be phased out sooner than planned, by the end of September 2026. The official reason for this is that the uptake has not reached expected levels so far but the decision to stop the program early was met by protests from farmers. Another reason for the discontinuation so soon after the introduction of the program might be the current budget constraints of the Government and the recent shift in the political climate. In the future, public funding for the conversion to animal-friendly stables will shift back into the AFP mentioned above, which however, offers a lower support rate (40%) than the 'Federal programme for the conversion of livestock farming' ¹⁵³ (Interview with research institute).

The program - implemented by the Federal Office for Agriculture and Food (BLE) - consists of two funding streams: investment support and support for additional operating costs. The latter type of funding of additional ongoing costs is a new element introduced by this program. The scale of funding is linked to the size of the investment: For investments up to €500,000, up to 60 % of total construction costs can be funded; for investments up to €2 million, up to 50 % may be funded, and for further costs up to €5 million, up to 30 %. Participation can be done on a barn-by-barn basis, which makes partial conversions of operations eligible for funding.

However, applying for investment support already requires a building permit to be in place – the procedure for which takes a long time, which has likely slowed the uptake of the program. This requirement made the program design less attractive for farmers (interview with research institute).

The higher ongoing costs that animal-friendly livestock farming involves can be partially subsidised through an annual grant, paid per eligible animal (sows, piglets, and fattening pigs). This funding component expires in 2028. Again, the amount depends on the number of animals

¹⁵² <https://www.bmleh.de/SharedDocs/Archiv/Meldungen/2024/240314-bundesprogramm-umbau-tierhaltung.html>

¹⁵³ https://profarm.info/auslauf-des-foerderprogrammes-umbau-der-tierhaltung/#Gr%C3%BCnde_f%C3%BCr_das_Auslaufen_des_F%C3%B6rderprogrammes

Barriers and enablers

kept. For up to 50 sows, 1,500 rearing piglets, and 1,500 fattening pigs, up to 80 % of the additional ongoing costs can be subsidised. For up to 200 sows, 6,000 rearing piglets, and 6,000 fattening pig, up to 70 % of the additional costs can be covered (BLE, 2021).

Also in 2024, the Agricultural Rentenbank's grant programme 'Zukunftsfelder im Fokus' ('Future Fields in Focus') was expanded to include the funding field 'Stable Conversions for More Animal Welfare'. Small and medium-sized enterprises that invest in nine "future fields", now including stable conversions for improved animal welfare, are eligible for support via subsidised loans.

Like with the Federal subsidy programme, funding requirements are linked to the official 'Haltungsform' levels of housing systems, and require the conversion to housing facilities that are at least classified as level 3 and above. Funding is also available for laying hens in free-range systems, and for pig barns with extra space, outdoor climate or outdoor access. (Rentenbank, 2025).

On a regional level, some Länder, namely Baden-Württemberg, Bavaria, Lower Saxony and North Rhine-Westphalia, offer subsidy programs for the investment in animal welfare-friendly pig stables, and for additional ongoing costs¹⁵⁴.

Costs

The implementation of the new requirements comes both with high upfront investment costs and with higher ongoing costs for the farms since handling sows when they are not confined requires more labour (interview with research institute).

The Federal Ministry for Agriculture had published the estimated costs for the shift from sow crates to free range keeping in its Legal Draft from 2019, assuming investment costs of about 880 € per sow for the conversion of farrowing and insemination areas - resulting in a total upfront investment cost of 713 million € for the industry (Bundesministerium für Ernährung und Landwirtschaft, 2019). This cost estimate was criticised by the Federal Association for Cattle and Pigs - according to which stable conversion costs could be expected to be much higher (2,000 - 2,500 € per pen in the farrowing unit, and €2,000 to €3,000 per stall place in the service and waiting areas) (Bundesverband Rind und Schwein e.V., 2019).

In 2024, the Thünen Institute of Farm Economics and the KTBL published calculation results on the investment requirements and additional operating costs for the implementation of animal welfare measures in pig farming – with the upcoming legal requirements in sow farming as one of the major components. The calculations were commissioned by the government as a basis for the federal subsidy programme to promote the conversion of animal husbandry. They compare the costs of building a new stable meeting the animal welfare requirements with the baseline, i.e., the construction costs (replacement value) of the existing barn. Assuming a herd size of 200 sows, the investment requirement for a barn increases by at least 72 percent - from around €0.8 million in the baseline scenario to at least €1.4 million for a barn that meets the animal welfare requirements (costs differ between different barn types, with 1.4 million € for an organic barn, over €1.5 million for an outdoor-climate barn, and about €1.7 million for a barn with an outdoor run). This translates into a cost increase of 3.480 € costs per sow. An additional 10 percent needs to be added for permitting costs for the building.

With regard to additional operating costs above the baseline, these range between €421 (in an outdoor-climate barn) and €537 per sow (in the outdoor-run variant; in the organic system, the additional costs amount to €503 per sow). This is mainly a result of labour costs increases (by

¹⁵⁴ <https://profarm.info/aktuelle-foerderprogramme-fuer-tierwohl-stallumbau/>

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between 73 percent and 2.1 times), (Deblitz et al., 2024).

'InKalkTier', a publicly available, German cost-calculation model that estimates production costs and economic impacts of different livestock-housing and animal-welfare requirements, shows that the upfront investment costs and ongoing costs for a new, more animal-friendly farrowing area is not more expensive than the more conventional model: An outdoor-climate barn, free-movement pen with free farrowing, and outdoor run, requires an upfront investment per sow place of €12,125, and annual building costs of €1,066 per sow place. In comparison, investment costs for a closed barn, free-movement pen (which is only a slight improvement from the conventional model) amount to €12,277 and annual costs to €1,145 per sow place¹⁵⁵.

Demand side measures

Consumer trends and labelling of pork

The NEULAND Association for animal-friendly and environmentally sound livestock farming introduced their animal husbandry label "NEULAND" over 30 years ago. Among other things, Neuland explicitly prohibits the use of permanent fixation for sows. The sows must be able to move freely and without restriction at all times before and during farrowing, as well as during the suckling period (Neuland, 2024). However, the market share of NEULAND pork in Germany is below 1%.

In 2024, the government decided to make animal husbandry labelling mandatory for all fresh pork products sold in supermarkets, and government-verifiable inspections are being introduced. The mandatory label will be introduced on March 1, 2026. This new government label ("Tierhaltungskennzeichen") is aligned with the retailers' label ("Haltungsform") and divides housing into five levels. Just like the retailer's label, however, it only applies to the period of the so-called 'productive phase', which means that the insemination and farrowing phases are not considered¹⁵⁶.

The voluntary label "Haltungsform" was developed by a joint initiative ("Initiative Tierwohl") of major food retailers such as Aldi Süd and Aldi Nord, Edeka, Kaufland, and Rewe, as well as fast-food chains like McDonald's, and launched in 2019. Like the new mandatory label, it does not provide any information about the use of crates in pig breeding - except for the highest level that indicates organic production, where the use of crates is prohibited¹⁵⁷.

Industry commitments around pork

The industry alliance "Initiative Tierwohl" has agreed to establish level 2 of their five-tier animal husbandry label 'Haltungsform' as the minimum standard. Major German supermarket chains Lidl, Aldi Süd, Rewe, and Penny will no longer sell meat from the lowest husbandry level

¹⁵⁵ <https://ktbl.inkalktier.de/app/2/39?compare=true&compareids=1200-1202>

¹⁵⁶

https://www.bmleh.de/DE/themen/tiere/tierschutz/tierhaltungskennzeichnung/tierhaltungskennzeichnung_node.html

¹⁵⁷ <https://www.bund.net/massentierhaltung/haltungskennzeichnung/#:~:text=Kennzeichnung%20in%205%20Stufen&text=Eingeordnet%20werden%20alle%20bestehenden%20Haltungsverfahren%20in%20f%C3%BCnf,%E2%80%9EStall%E2%80%9C%20%E2%80%9EStall%20+%20Platz%E2%80%9C%20%E2%80%9EFrischlufstall%E2%80%9C%20%E2%80%9EAuslauf/Weide%E2%80%9C%20%E2%80%9EBio%E2%80%9C>

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(‘Haltungsform’ level 1) by the end of 2025¹⁵⁸. However, this makes no difference in terms of the use of crates in sow farming.

Animal welfare and health

The abolition/limited use of gestation and farrowing crates means that the health risks and stress created by the permanent restriction of movement, which can cause behavioural disorders and injuries and keeps sows from freely contacting their piglets, are eliminated¹⁵⁹. However, the conversion to free farrowing and keeping sows in groups has its own health risks:

One reason for the confinement in the farrowing area has been to prevent the sows from accidentally crushing their piglets when lying down after birth. In the in the gestation area, it is important to prevent fights and avoid unnecessary stress for the sows that could jeopardise pregnancy. This is why the legal requirements mandate the provision of retreat areas for sows so they can avoid each other during regrouping or rank fights, which is particularly important for low-ranking sows.

Research, projects, and innovation

In 2019, the German government appointed an expert commission (*Kompetenznetzwerk Nutztierhaltung*, often referred to as the Borchert Commission) to develop a long-term, socio-economically viable strategy for transforming livestock farming in Germany toward significantly higher animal-welfare standards. The Commission’s recommendations have shaped much of the current political debate on financing and implementing Germany’s livestock transition.

9.4 The transition to cage-free farming for the laying hen sector in Germany

9.4.1 Key characteristics of the sector

In Germany, a total of **2,280 farms** (as of 2024) keeps **51 million laying hens**.¹⁶⁰ The **regional concentration of egg production** is in the country’s Northwest, in **Lower Saxony and North Rhine-Westphalia**, where about half of all laying hens are kept. As of 2023, 87 percent of laying hens were kept in farms with more than 10,000 heads of livestock.

Germany’s estimated total **yearly egg production** amounted to **13.7 billion** eggs in 2024.¹⁶¹ Fifteen years earlier, in 2009 and 2010, the phase-out of conventional cage farming led to a significant decline in the number of laying

¹⁵⁸ <https://www.mdr.de/nachrichten/deutschland/wirtschaft/billigfleisch-haltungsform-eins-supermarkt-preise-100.html>

¹⁵⁹ <https://www.expertiseforanimals.com/informationen-artikel-en/pigs-in-agriculture>

¹⁶⁰ <https://www.bmel-statistik.de/landwirtschaft/tierhaltung/gefluegelhaltung#:~:text=In%20Deutschland%20haben%202024%202.280,etwa%20die%20H%C3%A4lfte%20aller%20Legehennen>

¹⁶¹ https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/03/PD25_097_413.html

hens and production volumes. Both have quickly recovered to levels comparable to those before the phase-out though (Thobe et al., 2021).

Demand drivers and trends in consumption

Egg consumption has remained relatively stable since 2000 and amounted to about **19.3 billion** eggs in 2022 (Thobe & Koch, 2024). Recently, per capita egg consumption in Germany reached a new high of 249 eggs in 2024, according to preliminary figures from the BLE (Federal Office for Agriculture and Food).

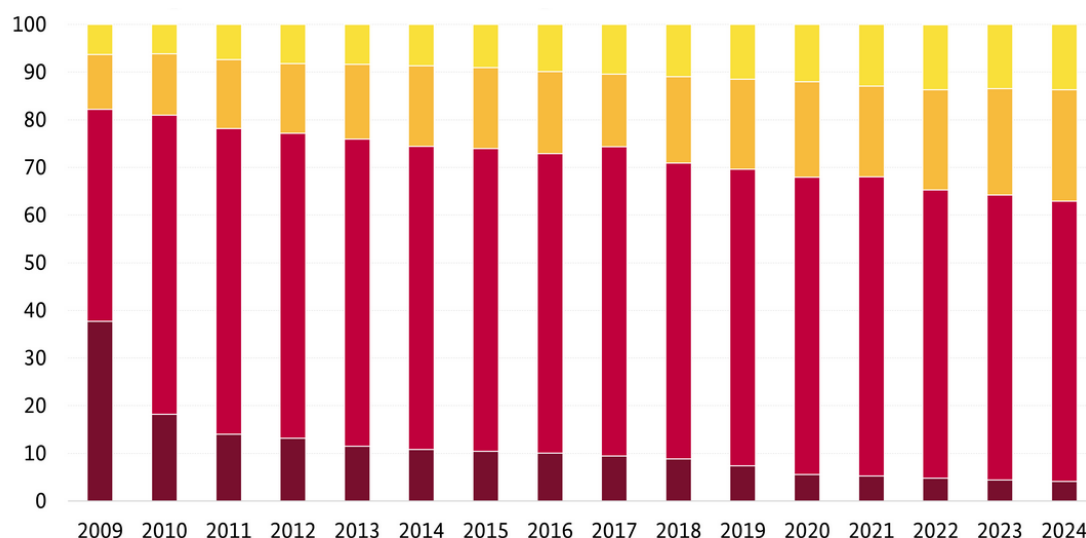
Use of cages in the sector

The four types of production systems used in Germany for laying hens are:^{162, 163}

- (1) **Barn-based (floor) system:** This is the dominant system in Germany accounting for **58 percent** of eggs produced. It includes the aviary system, in which up to four levels may be arranged on top of each other, effectively doubling the permitted stocking density. The use of this production system is slowly declining: over the past five years, it decreased by five percentage points.
- (2) **Free-range system:** The use of this husbandry system has continuously increased over the past years, and makes up a share of **23 percent** of egg production in 2024. It requires to provide access to an outdoor area in addition to the barn space.
- (3) **Organic production:** Organic egg production is also continuing to grow. In 2024, the share of organic eggs produced in Germany was 14.1 percent. Distinctive features of organic production include the mandatory outdoor access, lower stocking density in the barn, and feeding with organic feed
- (4) **Small group cages:** The use of cages is only residual in Germany. In 2024, the share was 4 percent, and is likely to go down to zero as national legislation will not allow cage practices after the end of 2025.

¹⁶² <https://www.nutztierhaltung.de/gefluegel/legehennenhaltung-in-deutschland/>

¹⁶³ <https://www.euomeatnews.com/Article-Germany:-Egg-production-increased-by-4.2-percent-in-2024/8374#:~:text=As%20in%20previous%20years%2C%20the%20number%20of,8.2%25%2C%20or%2052%20million%2C%20to%20588%20million>

Figure 1: Trends in laying hen production systems in Germany since 2009 (in %)

Colour coding: Dark red: cages; red: barn (floor) system; orange: free-range system; yellow: organic production

Source: <https://www.bmel-statistik.de/landwirtschaft/tierhaltung/gefluegelhaltung#:~:text=In%20Deutschland%20haben%202024%202.280,etwa%20die%20H%C3%A4lfte%20aller%20Legehennen>

Trade in the laying hen sector

As domestic production only covers 73 percent of consumption, **Germany is a net importer** of eggs – mainly traded from the Netherlands, where 75 percent of total imports are sourced (as of 2023). German **egg imports rose to 6.1 billion** in 2024 (https://www.ble.de/DE/BZL/Daten-Berichte/Eier/eier_node.html), while exports amounted to about 2.23 billion per year (Thobe & Koch, 2024).

In an international comparison, this strong dependence on imports to cover domestic demand very much sets the German egg sector apart from other countries. Overall, the EU market is self-sufficient (101%), and the Netherlands and Poland have production levels above 200% (interview with industry labelling organisation).

Table 17: Overview of the laying hen sector characteristics

	Animals kept	51 million
Production	Production p.a.	13.7 billion eggs
	Number of farms	2,280
	Regional concentration	Lower Saxony and North Rhine-Westphalia
Consumption	Annual domestic consumption	19.3 billion eggs
Use of cages	Share of animals kept in cages	4 % (expected to be 0% by the end of 2025 due to legal ban)
	Types of cages used	Small group cages with 800 cm ² space per hen
Trade	Imports p.a.	6.1 billion
	Exports p.a.	2.23 billion
	Key trade partners	Netherlands (75% of imports)

9.4.2 Barriers and enablers to the implementation of a cage-free transition for laying hens in Germany

Germany has a relatively high egg consumption of around 14 kg per capita. Since the domestic production only covers around 73 percent of consumption, more than a quarter of eggs consumed in Germany are imported. This creates a particular challenge for the sector: while domestic production is regulated by the ban on cages, imports are not subject to this regulation. This would be a major competitive disadvantage if German retailers had not imposed standards on all shell eggs sold. The result is that foreign producers selling to Germany (esp. from the Netherlands) adhere to these standards – however, this is only true for shell eggs, not for eggs used in processed products (interview with industry labelling organisation).

Given that Germany banned the use of all cages in the laying hen sector with a transitional period until the end of 2025, it is only residual in Germany, with only 4 per cent of laying hens being still kept in small-group cages. More than half of the population of laying hens in Germany are kept in barn-based (floor) systems.

Germany had already banned conventional battery cages in laying hen husbandry (but still allowing small group cages) earlier, and when the ban came into force in 2009/2010, egg production sharply declined, as many smallholders quit and there was a transitioning phase during which remaining producers converted their barns. However, the sector recovered quickly within about two years: From 2011 onward, both the number of hens and farms increased as housing capacities were expanded. Between 2009 and the end of 2013, German producers invested in approximately 9 million new laying hen places (Thobe et al., 2021).

Since producers made these investments in 2009/2010 and have a legally guaranteed right to operate the facilities for a certain time period (about 12 years), the ban of small-group cages could only come into force later (interview with industry labelling organization).

Successful litigation by the state government of North Rhine-Westphalia before the Federal Constitutional Court, which challenged the use of battery cages for laying hens as incompatible with the German Animal Protection Act, preceded the political action that led to the phasing out of cages.

An important factor in the development was industry commitments. In the case of cage-free eggs, voluntary commitments by major German supermarket chains to exclude 'cage eggs' - driven by NGO negotiations and consumer expectations - paved the way for the 2015 national ban on all cage systems, as it helped change the political debate.

The significance of labelling and consumer attitudes is highlighted by the fact that, in 2008 (before the national ban on battery cages came into force), market shares of cage-free husbandry systems for table eggs sold directly to consumers - which have been subject to mandatory labelling - was much higher (around 70 percent) than the share of cage-free husbandry systems used in production (around 38 percent). Similarly, despite large price differences, the market shares of cage-free table eggs have been significantly higher than those of cage-free processed eggs - which are only subject to voluntary labelling (Wissenschaftlicher Beirat Agrarpolitik beim BMEL, 2015).

However, since 27 percent of eggs consumed in Germany are imported, and since there is no mandatory labelling for processed foods containing egg, it cannot be determined how many imported cage eggs are still used for the production of processed foods, and how many imported processed foods contain cage eggs. The hospitality sector also still remains as sales channels for cage eggs.

In Poland, Germany's second-largest foreign supplier of eggs, over 70 percent of laying hens are still kept in enriched cages (Grass, 2024). In the Netherlands, Germany's most important foreign supplier of eggs (and the market that follows German retailers' standards on cage-free eggs), there is political pressure to reduce egg production, which means that demand will be met to a greater extent by other countries in the future, that do not implement these standards.

The lack of both mandatory labelling and industry commitments for eggs used in processed foods limits the impact consumer choices can make in this market segment. It can also lead to competitive distortions disadvantaging German producers. (Wissenschaftlicher Beirat Agrarpolitik beim BMEL, 2015; interview

industry labelling organization). A barrier to increasing transparency is that this would have to be implemented at EU level.

Table 18: Barriers and enablers for the transition to cage-free animal farming in Germany's laying hen sector

Barriers and enablers
Regulatory and policies
After Germany had already banned conventional battery cages in laying hen husbandry (but still allowing small group cages), a national ban on all cage systems was adopted in 2015, with a transitional period until the end of 2025. The bans were preceded by a series of political developments: In 1999, as a response to a complaint by the government of North Rhine-Westphalia, the Federal Constitutional Court declared battery cages incompatible with the requirements of the German Animal Protection Act. The Federal Ministry of Agriculture's proposed a new regulation to ban conventional battery cages in 2002. However, the legal enactment was blocked by several states governed by the conservative parties in the Bundesrat, pending further scientific evaluation of alternative systems. To overcome the deadlock, the ministry funded research projects in the following years, that tested small-group housing systems as alternatives to conventional battery cages. In 2006, the new minimum standards for the keeping of laying hens were incorporated into the revised Tierschutz-Nutztierhaltungsverordnung (Animal Welfare Livestock Husbandry Ordinance), which defined barn (floor) housing, free-range housing, and small-group housing as permissible systems, and prohibited traditional (battery) cage systems. A transitional period until the end of 2009 was granted for existing facilities. Animal welfare groups and some Länder (notably North Rhine-Westphalia) claimed that small group housing, which had slightly larger space per hen, perches, nest boxes, litter areas, but still restricted movement, still violated constitutional and animal-welfare standards. In 2010, the Federal Constitutional Court - again based on an application by the government of a federal state - declared the 2006 amendment unconstitutional. The court ruling reasoned that it did not sufficiently guarantee the hens' possibility for natural movement and behaviour. In addition, there were procedural flaws in adopting the regulation. The Federal Ministry had to revise the regulations again and commissioned new scientific evaluations on alternative systems. During this time, several Länder (especially North Rhine-Westphalia, Schleswig-Holstein, and Lower Saxony) began to regionally ban or phase out small-group cages. By the mid-2010s, the political momentum had shifted: Public and retailer pressure had increased (supermarkets stopped selling caged eggs), and the European and German debate had moved towards full cage-free systems. In 2015, the Bundesrat (chamber of the federal states) adopted a resolution calling for the end of small-group housing in Germany, and a final phase-out by 2025 (with possible extensions to 2028 in hardship cases) as a direct response to the 2010 court ruling. Enriched cages, which are permitted under the EU Directive, have been banned in Germany since 2021¹⁶⁴. Since producers already invested in converting

¹⁶⁴ <https://albertschweitzerfoundation.org/news/germanys-path-to-ending-cages-for-hens> ; https://www.thuenen.de/media/ti-themenfelder/Nutztierhaltung_und_Aquakultur/Haltungsverfahren_in_Deutschland/Legehennen/Steckbrief_Legehennenhaltung_2024_01.pdf?utm_source=chatgpt.com

Barriers and enablers

their barns in 2009/2010 to implement the first ban and have a legally guaranteed right to operate the facilities for a certain time period (about 12 years), the ban of small-group cages could not come into force earlier (interview with industry labelling organization).

Funding instruments

Traditionally, the Agricultural Investment Support Programme (AFP) is Germany's central programme for supporting investments in agricultural holdings. Under this programme, particularly high levels of funding can be granted under the AFP if the investor meets the 'structural requirements for particularly animal-friendly housing' when constructing livestock buildings¹⁶⁵.

Subsidy programs for the conversion to cage-free laying hen stables

The 'Federal Program for the Promotion of Animal-Welfare-Compatible Husbandry Methods' ("Bundesprogramm zur Förderung tiergerechter Haltungsverfahren") explicitly supported the conversion from battery cages to more animal-friendly systems for laying hens and ran between 2002 and 2006. Over its entire duration, low-interest loans amounting to approximately 19 million € were approved, resulting in the creation of about 1.3 million new laying-hen places¹⁶⁶.

Many *Länder*, e.g., Lower Saxony, North Rhine-Westphalia, Bavaria, and Baden-Württemberg, had additional programmes for barn conversions, offering investment grants and interest subsidies¹⁶⁷.

Costs

For laying hen stables, the average investment costs are €30-35 per place and the approval-to-production timeline is from 12 to 18 months. Between 2009 and the end of 2013, German farmers invested around 9 million new laying-hen places – resulting in total investment costs of more than 260 million € in new housing systems during this phase (Thobe et al., 2021; interview with industry labelling organisation).

The German Agricultural Society (Deutsche Landwirtschafts-Gesellschaft (DLG)), however, reports much higher investment costs per hen in 2020, of at least 70 € (van der Linde et al., 2020)+.

¹⁶⁵ https://dserver.bundestag.de/btd/16/050/1605044.pdf?utm_

¹⁶⁶ https://dserver.bundestag.de/btd/16/050/1605044.pdf?utm_

¹⁶⁷ https://www.provieh.de/wp-content/uploads/2021/01/Rundbried_03_2002.pdf?utm_

Barriers and enablers

Demand side measures

Consumer trends and labelling of eggs

For a long time, eggs were virtually the symbol of factory farming in German media and public awareness. This has been shaped by prominent NGO and campaigns by organisations such as PETA and the Albert Schweitzer Foundation, as well as by the Green Party. Consumer awareness is a major reason for how the sector progressed in terms of banning cage eggs (interview with industry labelling organisation).

The industry-developed certification **KAT (Kontrollierte Alternative Tierhaltungsformen)** is an industry-wide auditing and labelling system ensuring compliance with non-cage standards. In fact, the association first developed the coding system printed on fresh raw eggs that indicates the country of origin and the type of laying hen husbandry – and that since have become mandatory in the EU. The drivers of this certification initiative were German food retailers wanting to meet customer expectations (interview industry labelling organization).

Apart from the KAT, several other **voluntary labelling and certification schemes** exist in Germany, that provide additional information about animal welfare conditions. These have been introduced mostly in the early 2000s and include:

- **Initiative Tierwohl (ITW)**, a voluntary industry association led by major German retailers, **introduced the “Haltungsform” label in 2019, which indicates different levels of animal welfare standards** on fresh meat products, milk, and eggs. It is now being aligned with the government’s mandatory five-level system. While level 1 indicates the minimum legal requirements, **level 2 indoor housing with extra space and** slightly improved conditions, **level 3 indicates** outdoor contact or fresh air access, **level 4 free-range and level 5 organic**.
- **Organic Labels:** the **German Bio-Siegel** is the national equivalent of the EU Organic Label used **since 2001** (green leaf logo). Private organic associations with stricter standards are, e.g., **Bioland, Demeter, Naturland**¹⁶⁸.

For **processed food products containing eggs**, there is **no labelling requirement**, which makes voluntary labelling more important in these cases to recognise cage eggs. A 2024 study by the Consumer Advice Center of North Rhine-Westphalia (Verbraucherzentrale NRW) that examined ready-made cakes, pastries, delicatessen salads, mayonnaise, and sauces containing processed eggs, found that **61 percent of the products provided voluntary information** on the hens’ housing system. Notably, less than a third of branded products did so, while 95 percent of private-label products from retail chains included this information¹⁶⁹.

Industry commitments around cage-free eggs

In response to negotiations with NGOs, leading German retailers gradually delisted cage eggs from supermarkets, starting with Aldi Nord in 2003. By 2009, a total of 22 companies had **discontinued selling shell eggs produced in cage farming**, and almost every German

¹⁶⁸ <https://www.verbraucherzentrale.de/wissen/lebensmittel/lebensmittelproduktion/eier-aus-kaefighaltung-versteckt-in-lebensmitteln-45611>

¹⁶⁹ <https://www.zdfheute.de/ratgeber/eier-kaefighaltung-fertigprodukte-100.html>; [Verbraucherzentrale NRW](#)

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retailer had followed by 2011¹⁷⁰. This development made it much easier for policymakers to implement a ban on conventional cage housing as cage eggs were no longer relevant in retail. (Wissenschaftlicher Beirat Agrarpolitik beim BMEL, 2015).

An important driver for industry commitments to ban cage eggs were NGO campaigns and negotiations, the most prominent one being the **“Germany Goes Cage-Free” campaign**, which was launched by the Albert Schweitzer Foundation in 2009, and supported by 12 other animal welfare groups. It encouraged major supermarket chains to remove cage eggs from their shelves, and some food producers (e.g., Dr. Oetker, Bernbacher, Hilcona, Brandt, Schneekoppe) to switch to eggs from barn and free-range systems in their production processes.

Various animal welfare and rights organisations ran parallel or complementary **“Cage-Free” campaigns**, often **targeting specific retailers, food categories, or individual states or cities**.

While all big supermarket chains have responded to this appeal, the commitments are usually limited to the sale of shell eggs and do not cover processed food containing eggs. Also, only a number of food producers have followed through so far¹⁷¹.

Animal welfare and health

Floor and free-range housing systems give hens more room to move and allow them to perform many of their natural behaviours. However, the animals come into considerable contact with their own excretions, which leads to parasites building up over the course of a laying period and to more diseases. Drops in performance and increased mortality are often the consequence.

In addition, in large groups it is more difficult for hens to establish stable hierarchies, which means they sometimes inflict severe injuries on one another during ranking fights.

¹⁷⁰ <https://albertschweitzerfoundation.org/news/germanys-path-to-ending-cages-for-hens>

¹⁷¹ <https://albert-schweitzer-stiftung.de/unsere-arbeit/initiativen-programme/kaefigfrei-initiative>

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10. ANNEX 4 - POLAND

10.1 Key characteristics of the livestock sector

The livestock sector is an important component of the agricultural sector of Poland, both from an economic and a social perspective. In 2024, the livestock sector accounted for 62.7% of the market agricultural output in Poland (GUS, 2025). Poland is one of the largest livestock producers in Europe, with important livestock numbers of cattle, pigs, and poultry production, as detailed in the table below (Eurostat, 2024). According to data from the Central Statistical Office (GUS), the livestock population in Poland in 2024 stood at approximately 9.132 million pigs, 6.336 million cattle and 244 million poultry. The poultry sector comprised approximately 57 million laying hens and over 187 million broilers (GUS, 2025). In this regard, poultry has been the fastest-growing livestock area in Poland, notably thanks to a strong export demand.

Table 19: Livestock numbers in Poland and share in EU livestock total

	Cattle	Pig	Poultry
Number of heads / LSU	6,190,930 heads in 2024	9,078,250 heads in 2024	2,650,000 LSU in 2020
Share of total LSU	45.5%	28.1%	26%
EU number of heads / LSU	71,896,320 heads in 2024	132,135,520 heads in 2024	19,597,160 LSU in 2020
Share of EU total	8.6% of EU heads in 2024	6.9 % of EU heads in 2024	13.52% of EU heads in 2020
Number of heads / LSU	4th in heads in 2024	6th in heads in 2024	2nd in LSU in 2023

Source: [Eurostat](#) and [CAP context indicators](#)

The number of farms with livestock declined continuously over the past decade. As a matter of fact, between 2010 and 2020, the number of livestock farms decreased by almost 30%, leading to 1,302,330 agricultural holdings in 2020 (Eurostat, 2020). However, production volumes remained stable or even increased, thanks to productivity gains (Eurostat, 2020; GUS 2020). Currently, the average age of Polish farmers is 52 years, which is comparable to the EU average (GUS, 2023; GUS, 2020). As a consequence, generational renewal remains a challenge, with younger farmers facing limited access to land and credit, despite targeted CAP and national measures aiming to support new entrants.

There are regional differences within the sectors, as intensive production is concentrated in a few key voivodeships while there is a coexistence of small and medium-sized family farms alongside industrial-scale units (GUS, 2023; MRiRW,

2024). The Mazowieckie, Wielkopolskie, and Kujawsko-Pomorskie voivodeships represent the main centers of pig and poultry production, while Podlaskie and Mazowieckie dominate cattle and dairy farming (GUS, 2023). The regional concentration of intensive production systems led to several environmental pressures, especially regarding manure management, local water quality, and GHG emissions. The total agricultural greenhouse gas emissions of the livestock sector were estimated at 14.2 million tons of CO₂ equivalent and accounted for approximately 32% of Poland's overall methane emissions (KOBiZE, 2022).

10.2 Consumption and trade related to animal products in Poland

Poland remains a net exporter of animal products, notably for poultry meat and eggs. In 2023, poultry meat exports represented 1.5 million tons, destined notably to Germany, France, and the Netherlands, making Poland the 3rd biggest exporter in the EU (Eurostat, 2024). On the other hand, egg exports amounted to approximately 240,000 tons, mainly directed towards the EU market. Imports of live animals appear smaller in comparison, though imports of processed poultry and pig products have been increasing since 2022 (Eurostat, 2024).

Regarding consumption patterns, the average individual meat consumption remains high, about 73 kg per person annually, with poultry representing more than 40% of the total intake (GUS, 2023). Egg consumption is also relatively stable, as the average annual consumption is situated around 190-200 eggs per capita, slightly above the EU average. However, consumer attitudes have started to shift. According to a survey conducted by Compassion in World Farming Polska, 42% of the people surveyed intend to reduce or have already reduced or stopped eating meat (CIWF, 2025). Although this survey shows a rising interest in animal welfare, prices remain the main element shaping consumers' choices.

10.3 The transition to cage-free farming for the calf sector in Poland

10.3.1 Key characteristics of the sector

Poland's cattle population exceeded 6.2 million heads in 2024, including around 2.2 million dairy cows, positioning it among the leading cattle producers in the EU (Eurostat, 2024; GUS, 2024). As to the regional concentration, it is the highest in the regions of Podlaskie and Mazowieckie, where traditional dairy farming predominates (GIW, 2023). The country's beef production in 2024 was estimated to be over 570 thousand tons in hot carcass weight, with total cattle slaughter

levels slightly increasing over time, despite the ongoing decline in herd size (GUS, 2024).

Use of cages in the sector

Calf housing systems in Poland primarily consist of individual pens or 'igloo' hutches during the first eight weeks, limiting natural behaviours of animals, but designed to meet the welfare standard set in the EU Directive 2008/119/EC (Otwarte Klatki, 2025). Group housing is recommended after this period, but adaptation varies widely across farms. The main concern associated with the welfare of calves is related to social deprivation during the early life stage. The standard practices for calves in Poland respect the EU basic legislation for calves, while some farms pursue higher welfare certifications (GIW, 2023).

Demand drivers and trends in consumption

The demand for products derived from calves remains quite high in Poland, following a stable consumption and expanding within processing industries (Eurostat, 2024; Polish Meat Association, 2024). Consumption trends are influenced by changing dietary preferences with a moderate shift toward higher welfare and organic dairy and veal products. However, economic considerations strongly influence purchasing decisions in this sector, especially in rural areas where more traditional consumption patterns prevail (Polish Meat Association, 2023).

Trade in the calf sector

Poland is an active exporter of live calves, veal, and dairy products, with exports mostly destined to neighbouring countries within the EU market (Eurostat, 2024). Imports are relatively limited but play a role in balancing domestic supply, especially in terms of breeding stock (Eurostat, 2024).

10.3.2 Barriers and enablers to the implementation of a cage-free transition for calves in Poland

As a result of the importance of the cattle sector, a significant number of calves are reared in Poland every year. However, as highlighted above, most of these calves are still housed in individual pens during the first weeks of their life. This is notably due to the absence of specific **legislation** adopted for calves at national level, which results in the application of basic EU legislation, which allows calves to be housed in individual pens for the first 8 weeks of their life. Significant changes in housing practices could therefore be driven by a revision of the EU legislation.

If there are insufficient **funding instruments** available at the national level to support collective housing for calves, Poland's CAP strategic plan may provide assistance through an investment scheme. Under this scheme, the purchase of facilities designed for the collective housing of calves is eligible for support. However, it is uncertain what share of this scheme is actually directed towards calves' housing facilities.

As illustrated in the table below, despite being associated with improved welfare of calves, the progress towards the collective housing of calves remains limited, as, for instance, the commitment of retailers or processors to animal welfare is limited and inconsistent. Additionally, there is a lack of **labelling schemes** associated with the welfare of calves.

Moreover, the potential effect of collective housing on the **health** of calves may be dissuasive for certain farmers. As a consequence, the provision of advisory support and training is critical to enable the transition towards collective housing for calves.

Table 20: Barriers and enablers for the transition to cage-free animal farming in Poland's calf sector

Barriers and enablers
Regulatory and policies
Directive 2008/119/EC, transposed into Polish law through MRiRW regulations under the Animal Protection Act, allows calves to be kept in individual pens for the first 8 weeks of their life. In practice, around 80% of Polish calves are housed in such individual systems (Otwarte Klatki, 2023). There is no national ban or phare-out plan for individual housing. Enforcement is carried out by the General Veterinary Inspectorate (GIW) through regional inspectorates, although public data on inspection results remains limited.
Funding instruments
Calf welfare improvements can be supported through the Dobrostan Zwierząt scheme, which covers cattle and provides annual payments for meeting higher welfare standards (MRiRW, 2024). The KPO "Rolnictwo 4.0" program also offers funding for modernisation and automation, such as precision feeding systems or environmental sensors, that can indirectly support group-housing systems (MRiRW, 2024). The CAP Strategic plan of Poland may also support the implementation of collective housing for calves. In this regard, an investment eligible for support under the CAP scheme "I 10.15" is the purchase of group housing for rearing calves ¹⁷² . It is, however, unclear what share of the EUR 309 million allocated for this support scheme for the 2023-2027 period will actually be spent on calves housing. Another practice, which is supported by Poland through its main eco-scheme "I 4.6", is the weaning of calves no earlier than 5 days after their birth.

¹⁷²https://agridata.ec.europa.eu/extensions/DashboardCapPlan/catalogue_interventions.html?page=ByUnitAmount

Barriers and enablers
Costs
The transition from individual pens to group housing may require structural investment on farm, for instance, to adopt a new barn, improve ventilation and purchase new feeding systems (Otwarte Klatki, 2023). A potential effect on cost can result from the initial increase of risk of enteric and respiratory disease, potentially associated with collective housing, which requires careful management. For what regards productivity, evidence suggests that long-term productivity can match or exceed individual housing, even though Poland-specific cost estimates are not yet available (EFSA, 2023).
Demand side measures
Calf-derived products lack mandatory welfare labelling, which limits consumer awareness of production conditions (for example, Reg. 1169/2011 covers general food information but not welfare indicators). Retailer or processor welfare commitments are limited and inconsistent, offering little market reward for farms transitioning to group housing. Public procurement occasionally includes animal welfare measures.
Animal welfare and health
Individual pens restrict social interaction but allow easier disease control in early life. Group housing can improve behavioural development, socialisation, and long-term welfare, but requires stronger hygiene, feeding management, and ventilation to avoid increased morbidity (EFSA, 2023). Calf health outcomes during the transition depend heavily on disease prevention, especially in respiratory and digestive disorders.
Research, projects, and innovation
Innovation support for calf welfare is mainly indirect. CAP AKIS advisory services and training initiatives provide technical guidance for improving management in group housing. The KPO 'Rolnictwo 4.0' program can fund digital tools that facilitate disease control in larger group pens (MRiRW, 2024). Investment measure I.10.15 offers infrastructure funding for cattle welfare improvements. However, Poland does not yet have any dedicated R&D programs or pilot farms focused specifically on transitioning from individual to group housing for calves, and advisory capacity remains limited (Otwarte Klatki, 2023).

10.4 The transition to cage-free farming for the laying hen sector in Poland

10.4.1 Key characteristics of the sector

The laying hens sector in Poland produced approximately 8.2% of the EU's total eggs in 2024, which made it the 5th largest producer within the EU, with a laying hens population exceeding 50 million heads (Compassion in World Farming, 2025; Eurostat 2024). The production is mostly concentrated within provinces such as Wielkopolskie and Mazowieckie, where the intensive poultry farms predominate. These numbers led to several environmental pressures for the poultry sector, which include methane emissions and waste management concerns (KOBiZE, 2022).

Use of cages in the sector

The use of enriched cages continues to be the conventional housing system for laying hens in Poland, concerning approximately 67% of the laying hen population in 2023, while the rest is housed in barn, free-range, and organic systems (Otwarte Klatki, 2025). This represents a gradual decrease, as it went from around 84% in 2010 and 74% in 2019. However, the transition to cage-free systems progresses unevenly, as it is more prominent in smaller-scale and retail-driven farms, while on the other hand, industrial farms often still rely on cage-based systems (GIW, 2023; Otwarte Klatki, 2025). Disease outbreaks have posed several challenges to the current state of housing laying hens, reinforcing the call to transition toward improved housing that contributes to reducing stress and strengthening animals' immune system (USDA, 2025).

Demand drivers and trends in consumption

The consumer's growing awareness of animal welfare has an effect on the Polish egg market as for instance, in 2024, around 70% of customers indicated a preference for cage-free and organic eggs (Compassion in World Farming, 2025). Individual consumption is slightly decreasing, with estimates around 156 eggs per person annually in 2022, which represents a decline from over 200 eggs per person in 2012 (Polish Meat Association Report, 2023). Retailers increasingly commit to traceable cage-free products, as for instance, more than 140 companies declared they will eliminate cage eggs from their stores by 2025 (Compassion in World Farming, 2025). The percentage of cage-free products represents between 25% and 30% of the retail market in major supermarket chains, with significant growth in organic and free-range categories (The Polish Meat Association Report, 2023). Despite the increasing consideration of animal welfare by consumers, the economic constraints remain the main criteria guiding consumer choices (Eurostat, 2023).

Trade in the laying hen sector

Poland is a significant egg exporter, shipping around 240,000 tons mainly to EU member states, while continuing to import relatively small quantities to offset supply interruptions (Eurostat, 2024). Trade dynamics are affected by disease-related supply changes and ongoing shifts toward cage-free production to meet evolving market regulations and consumer expectations (Eurostat, 2024).

10.4.2 Barriers and enablers to the implementation of a cage-free transition for laying hen in Poland

The laying hen sector represents an important part of the livestock sector in Poland, making it the 5th largest producer in the EU. However, a large part of the production, as described above, **relies mostly on the use of enriched cages**, despite a progressively larger share of the production relying on alternative systems. It appears that a transition towards cage-free systems for laying hen would not only be associated with better animal welfare, but would also **meet consumers' expectations**, which could potentially affect the current negative trend in individual egg consumption.

As explained in the table below, the current **legislation** in Poland is aligned with basic EU requirements, which authorise the use of enriched cages. This highlights the potential impact of a revision of the EU legislation for laying hens.

Despite the absence of a legislative ban on the use of enriched cages, Poland adopted certain **funding instruments** aiming to support cage-free production for laying hens, mostly through its CAP Strategic plan. This funding instrument is very relevant to implement the transition, as the transition might require structural **investment** on farm and can be associated with increased **running costs**, which may be dissuasive for farmers, especially for smaller farm, as explained in the table below.

Besides the existence of funding instruments, the transition might also be supported through the **commitment of retailers** and the adoption of mandatory **labelling schemes**. More significant investment in **research and technical assistance programs** focusing on cage-free systems could also encourage the transition towards these systems.

Table 21: Barriers and enablers for the transition to cage-free animal farming in Poland's laying hen sector

Barriers and enablers
Regulatory and policies The applicable legislation for laying hens in Poland is the translation of Directive 1999/75. Therefore, enriched cages remain legal and dominate production, as there are currently no national ban or timeline for a cage-free transition (Otwarte Klatki, 2023). As a consequence, the revision of EU rules could lead to several improvements for the housing practices in egg production.
Funding instruments The 'Dobrostan Zwierząt' eco-scheme (I 4.6) offers welfare payments to different species. To benefit from this payment, laying hen farmers must rear the animals outside of cages. Therefore, this support scheme could contribute directly to the transition away from cage farming in the laying hen sector. However, it appears that only a small share of the sector

receives such payment. CAP support schemes from the rural development program (I.10.15) target certain animal species, such as cattle and pigs, but do not apply to poultry.

Costs

Enriched cages sustain around 76% of Polish production for laying hens. Conversion to barn/aviary systems entails high CAPEX and higher operating costs. Productivity may drop slightly (due to fewer eggs per hen or higher mortality), especially short term. This is due to the fact that birds spend more energy on movement and thermoregulation in bigger spaces, their hierarchies must re-establish, and management errors might occur in early phases of new systems (EFSA, 2023; WUR, 2021).

Demand side measures

Eggs must bear codes 0-3 (0 organic, 1 free-range, 2 barn, 3 enriched cages) (Reg. (EC) 589/2008), making production systems transparent for consumers (Kowaliszyn et al., 2012). Consumer surveys show rising preference for cage-free/ free-range eggs, with ~70% indicating such choices (Compassion in World Farming, 2025). More than 140 companies, including major supermarkets like Biedronka and Żabka, have pledged to end cage-egg sales by 2025, creating strong supply-chain pressure for cage-free production (Otwarte Klatki, 2025). Public procurement is slowly emerging, offering further demand potential (Okręgowy Inspektorat Służby Więziennej w Olsztynie, 2025).

Animal welfare and health

The benefits of cage-free systems on laying hens have been widely acknowledged by the literature, allowing key natural behaviours, such as perching, nesting, and dustbathing. However, the transition periods may be associated with higher risks of feather-pecking, cannibalism, and disease spread, particularly if the stocking density, the litter quality, and the ventilation are not well managed (EFSA, 2023).

Research, projects, and innovation

There is substantial NGO-led research relevant to cage-free transition. Otwarte Klatki and Anima International publish regular policy briefs and reports related to market trends, farm practices and retailer progress (e.g. Polski Rynek Jaj 2024, CIWF; Otwarte Klatki, 2024). Public innovation support is mainly indirect: KPO Rolnictwo 4.0 funds automation, ventilation, and monitoring systems, and CAP advisory/ training schemes offer technical support (MRiRW, 2024). However, Poland still lacks a dedicated national research and developments or pilot programmes focused solely on cage-free housing for laying hens.

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