



foodwatch

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THE EU MEAT INDUSTRY

Illusions of Tradition
and Naturalness

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BACKGROUND

In the European Union, current dietary patterns are not in line with nutritional recommendations while diet-related diseases and obesity sit at worryingly high levels across Europe¹. According to the European Commission, EU citizens consume too much meat², only 12% eat enough fruits and vegetables, while fibre consumption across the population also falls below nutritional guidelines³.

These food consumption trends not only pose significant public health challenges but also have serious environmental and climate impacts. There is a scientific consensus that substantial dietary changes are required, including a reduction in the consumption of meat⁴. However, lobbying tactics have delayed, diluted and even halted attempts to shift diets towards less and better meat⁵.

1 **European Commission**, Drivers of food security (Commission Staff Working Document SWD(2023) 4 final), January 2023. (Accessed: 03/06/2026)

2 **Eurostat**, Daily consumption of fruit and vegetables (dataset HLTH_EHIS_FV3E). (Accessed: 15/10/2025)

3 **European Commission** – Health Promotion Knowledge Gateway, Overview of dietary fibre intake across European countries. (Accessed: 15/10/2025)

4 **Group of Chief Scientific Advisors (Scientific Advice Mechanism)**, Towards Sustainable Food Consumption (Scientific Opinion No. 14), June 2023. (Accessed: 03/06/2026)

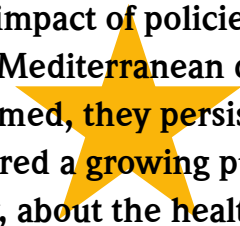
5 **InfluenceMap**, The European Meat and Dairy Sector's Climate Policy Engagement: How the meat and dairy industry is influencing the EU's agenda to reduce the climate footprint of diets and livestock, May 2024. (Accessed: 03/06/2026)

EU CONTEXT

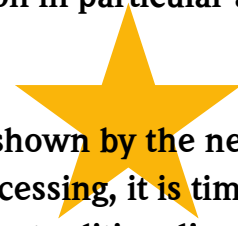
In 2020, the EU published its ‘Farm to Fork Strategy’, marking a shift in policymakers’ thinking on diets. It recognised the need to transform food environments in which EU citizens make their food choices and explicitly mentioned the need to consume less red and processed meat. However, six years later, the implementation of the Strategy has largely failed, particularly on the ‘fork’ side, where commitments to address demand have been almost entirely unfulfilled⁶.

The recent Vision for Food and Agriculture offers virtually no concrete commitments in these areas. Political resistance has further hindered progress, with hostility toward dietary policies coming not only from traditionally right-wing parties but to some extent from across the political spectrum too.

⁶ [Euronews](#), Over half of von der Leyen’s food policy promises weren’t met, analysis shows, February 2024. (Accessed: 03/06/2026)



A prominent theme in the Farm to Fork debates was the purported negative impact of policies on ‘traditional foods’ and diets, including the Mediterranean diet. Although such concerns were often misinformed, they persisted across the political spectrum and mirrored a growing public anxiety, both within Europe and globally, about the health effects of ultra-processed foods (UPFs). At the same time, the exaggerated and misleading rhetoric from opponents to dietary shifts has firmly established diets and meat consumption in particular as a key strand of the ‘culture wars’.



Given the recent interest shown by the new Health Commissioner in food processing, it is timely to examine not only the ‘unnatural’ or ‘non-traditional’ aspects of processed meat but also the production systems behind the majority of meat consumed in the EU, including fresh meat.



THE ROLE OF THE MEAT INDUSTRY

The meat lobby at the EU level has been instrumental in the efforts to undermine any policy plans aiming to help consumers shift to more healthy and sustainable dietary choices, including the reduction of the amount of meat consumed by European citizens.

In debates, meat lobbyists routinely press upon themes of current meat production (and consumption) as being ‘traditional’, ‘natural’ or as necessary to support the rural way of life⁷.

It is therefore worth examining:

- Who are the key players promoting this rhetoric?
- Which narratives they use to promote meat production and consumption?
- Why their claims of meat production and consumption as traditional or natural are disingenuous and misleading?

⁷ Competere, Lucy Lands in Brussels. (Accessed: 03/06/2026)



KEY STAKEHOLDERS IN THE EU MEAT LOBBY

The meat lobby in the EU is well-organised, well-resourced and well-connected⁸. Its lobbying network includes a range of powerful actors working to influence policy, using an effective mix of direct lobbying of policymakers, coalition associations, PR front groups, legislative interventions as well as (opportunistic and arguably exploitative) mobilisation of grassroots concerns (via e.g. farmers' protests) to slow, reshape or halt policies that would affect their business model or accelerate the necessary dietary shifts.

Major agricultural associations such as Copa Cogeca are incredibly influential in pushing their policy demands in the agri-food area which are then repeated and reinforced by their powerful national farming union members e.g. France's FNSEA or Italy's Coldiretti. As one of the most powerful lobbying groups in Brussels, Copa Cogeca has managed to capitalise on its deep resources and privileged access to policymakers to dominate the agricultural policy landscape⁹.

Other important players also include meat and dairy industry federations such as CLITRAVI, AVEC, or the European Dairy Association (EDA) which represent processors, poultry and dairy producers respectively and have been very active in EU policy discussions.

More recently, public relations alliances such as European Livestock Voice (ELV) and its MeattheFacts website (backed by 14 livestock industry groups including Copa Cogeca), have been established to promote industry-favoured narratives amongst policymakers. Interestingly, the launch of the ELV's activities as a communications tool for the 'agri-industry', came not only at a key moment for the Farm to Fork Strategy but also at a time when meat companies globally began investing more heavily in narrative campaigns to combat perceived threats to meat production and consumption¹⁰.

⁸ **InfluenceMap**, The European Meat and Dairy Sector's Climate Policy Engagement, May 2024. (Accessed: 03/06/2026)

⁹ **Corporate Europe Observatory**, Privileged access for Copa Cogeca and industry in DG Agriculture, October 2020. (Accessed: 03/11/2025)

¹⁰ **Changing Markets Foundation**, Meat vs EAT-Lancet: The dynamics of an industry-orchestrated online backlash, September 2025. (Accessed: 03/06/2026)

Major agribusinesses and processing companies can also provide funding and expertise, while the usual consultancies and PR firms also coordinate lobbying strategies and campaigns across the EU under the radar.

These actors and the narratives they have pushed have resulted in measurable political wins. However they have not yet completely halted the broader market, consumer demand and policy movement toward more plant-based options.

PREDICTED MARKET CHANGES: THREAT TO MEAT PRODUCERS

The EU overall meat market and the processed meat market were worth around \$423 billion¹¹ and \$95 billion respectively in 2025, with the latter due to grow annually by 3.6% in the EU¹². The European Commission has also noted that while consumers are paying more attention to what they eat due to environmental and health concerns, drivers such as convenience will likely lead to a (further) shift from fresh meat to more processed meat and preparations¹³.

On the other hand, the plant-based market is estimated at just \$4.4 billion in 2025¹⁴. While this arguably shows the David vs Goliath nature of the meat industry compared to the plant-based market, with growing consumer awareness of the health and climate implications of meat consumption, the latter is expected to grow much more sharply with almost 9% growth predicted per year. Already, the EU leads the global meat substitute market (42% of the market share in 2024)¹⁵.

¹¹ **Statista**, [Market Insights: Processed Meat / Meat Substitutes – Worldwide](#), (Accessed: 05/11/2025)

¹² **EASAC**, [Meat Alternatives](#) (EASAC policy report 49, ISBN 978-3-7001-5010-7), 2025, (Accessed: 03/06/2026)

¹³ **European Commission, DG Agriculture and Rural Development**, [EU Agricultural Outlook for Markets, Income and Environment 2022–2032, 2022](#), (Accessed: 03/06/2026)

¹⁴ **Statista**, [Market Insights: Meat Substitutes](#), (Accessed: 05/11/2025)

¹⁵ **EASAC**, [Meat Alternatives](#) (EASAC policy report 49, ISBN 978-3-7001-5010-7), 2025, (Accessed: 03/06/2026)

RHETORIC USED BY THE MEAT INDUSTRY

The meat industry clearly perceives a threat from the growth of plant-based alternatives (PBAs) and have launched various communication and regulatory initiatives in attempts to curtail such products' popularity. The recent campaigns against PBAs using 'meaty denominations' such as 'sausage' or 'burger' exemplifies both the level of concern from the meat industry about such products as well as the misleading arguments the meat industry often uses in such policy debates.

In its 'Ceci n'est pas un steak!' campaign video on meat denominations for example, Copa Cogeca illustrates some of the industry's rhetorical tactics as it compares a beef steak to a veggie steak¹⁶. The voiceover states that while everyone knows what a steak's ingredients are, with a veggie steak you won't know because the ingredients are not the same, while the screen shows the veggie steak's long lists of ingredients and additives. They invoke the nutritional benefits of 'traditional' steak compared to veggie ones while also accusing the 'industry of imitations' of culturally hijacking meat denominations. According to Copa Cogeca, such denominations are deeply rooted in our cultural heritage, adding that 'no one needs to explain what these products [traditional steaks] are or what to expect when buying them'.

Such rhetoric is a typical snapshot example of the meat industry's well-documented strategic narrative tactics it deploys when defending its industry vis à vis plant-based alternatives: framing meat as natural, traditional, an essential part of cultural and rural heritage as well as nutritionally beneficial. At the same time, it then portrays plant-based alternatives as artificial, processed and corporate¹⁷.

This rhetoric masks a livestock production system that bears little resemblance to the image the industry promotes. Over the years, the system has become increasingly intensive and consolidated, at the expense of smaller, family-run farms. It relies heavily on imported GMO feed, often linked to deforestation and land grabs in third countries¹⁸, while animals are frequently raised in inadequate welfare conditions with many never seeing the outdoors and spending their entire lives confined to factory farms. Moreover, greenhouse gas emissions remain persistently high, and the environmental impacts of intensive livestock production - including air, water, and soil pollution, as well as biodiversity loss - continue to worsen. On top of this, processed meats, classified for over a decade as Group 1 carcinogens, remain widely sold to consumers. The myths perpetuated by the meat industry are worth unpicking, examining the various above-mentioned elements.

¹⁶ **Copa-Cogeca**, Let's not become surrealistic and "call a spade a spade" [#cecinestpasunsteak \[YouTube video\]](#), 2023. (Accessed: 03/06/2026)

¹⁷ **Changing Markets Foundation**, Meat vs EAT-Lancet: The dynamics of an industry-orchestrated online backlash, September 2025. (Accessed: 03/06/2026)

¹⁸ **European Commission**, Drivers of food security (Staff Working Document), January 2023. (Accessed: 03/06/2026)



HOW 'NATURAL' OR 'TRADITIONAL' MEAT IN THE EU IS LARGELY A MYTH

PRODUCTION AND CONSUMPTION LEVELS

Today's levels of consumption and production of meat cannot be described as either traditional or natural.

Since the early 1960's Europe's meat production has approximately doubled¹⁹. In spite of a now solid scientific consensus that the consumption of meat in Europe is neither healthy nor sustainable, the levels of per capita meat consumption in the EU remain high, having grown exponentially over the past 50 years. In 2000 the per capita consumption of meat was 65.0Kg which has remained broadly steady since with estimated consumption for 2025 put at 68.4kg²⁰. The European Commission itself acknowledges that meat consumption in Europe is between two and four times higher than recommended levels²¹.

PROCESSED MEAT

Member State dietary guidelines consistently recommend consumers to limit or avoid consumption of processed meat²² due to well-established and -evidenced health implications, classified as it is as a Group 1 Carcinogen by

IARC²³. However, processed meat remains a significant part of European diets with consumers self-reporting that, after poultry, it is the type of meat they consume the most²⁴.

Although industry often describes processed products such as sausages, bacon or cured hams as traditional products part of a balanced diet in contrast to plant-based alternatives which they portray as ultra-processed or artificial, these conventional processed meat products frequently contain food additives which would classify them as ultra-processed themselves. Indeed, among the most prevalent additives are nitrates and nitrites, used as preservatives and colorants but also strongly linked to cancer risk. A study analysing the most popular UPF products consumed by adults across Europe shows that UPF sausages are the second biggest category of UPF foods consumed, and in some countries the most consumed UPF.²⁵

Even products with Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI) labels can sometimes still rely on chemical additives or preservatives in spite of their quality image and premium price²⁶.

General marketing terms such as 'traditional', 'artisanal' or 'natural' are not legally defined in the EU (although some Member States have

¹⁹ [Our World in Data, Meat and Dairy Production](#) (data source: Food and Agriculture Organization of the United Nations, 2025), 2025. (Accessed: 03/06/2026)

²⁰ [European Commission, DG AGRI – Agri-food data portal, Meat products short-term outlook](#). (Accessed: 27/10/2025)

²¹ [European Commission, Drivers of food security \(SWD\(2023\) 4 final\)](#), 2023. (Accessed: 03/06/2026)

²² [European Commission – Health Promotion and Disease Prevention Knowledge Gateway, Summary of FBDG recommendations for meat for the EU, Iceland, Norway, Switzerland and the United Kingdom](#). (Accessed: 27/10/2025)

²³ [World Health Organization, Cancer: Carcinogenicity of the consumption of red meat and processed meat \(Q&A\)](#). (Accessed: 03/06/2026)

²⁴ [BEUC, Farm Animal Welfare: What Consumers Want. A survey of Europeans' understanding and expectations, 2024](#). (Accessed: 03/06/2026)

²⁵ [Mertens, E., Colizzi, C. & Peñalvo, J.L., Ultra-processed food consumption in adults across Europe, European Journal of Nutrition 61, 1521–1539, 2022](#). (Accessed: 03/06/2026)

²⁶ [Höhn, G.L., Huysmans, M. & Crombez, C., Healthy food traditions? Nutritional quality and food composition of EU geographical indications, Q Open, Vol. 3, Issue 1, 2023](#). (Accessed: 03/06/2026)

gone further and provided guidance²⁷). As such, producers are able to exploit this legal grey area and prominently display such terms on the front of the pack where they are aware consumers are more likely to look, while the inclusion of additives is concealed in the list of ingredients, in tiny font, on the back of the pack.

INDUSTRIALISATION AND INTENSIFICATION OF LIVESTOCK IN THE EU

To meet the high domestic consumption (as well as the valuable export market), livestock farms have consolidated: there are fewer of them but the farms which remain are larger and much more intensive²⁸. The pastoral images of EU agriculture promoted by the agri-food industry bear little to no resemblance to the intensive factory farms of today in which the vast majority of livestock is raised for meat. Indeed, agricultural intensification has in fact sharply increased over the past decades in general, with Eurostat figures showing that the number of farms has steeply declined by 37% between 2005 and 2020 (the latest year for statistics) – a loss of 5.3 million farms across Europe with the vast majority being smaller farms²⁹.

Ironically, at the EU level, stakeholders such as Copa Cogeca and their associated communication

groups such as European Livestock Voice present the agricultural sector as the traditional pillar of rural local communities, often evoking potential risks to ‘family farms’ during policy debates.

For example, the European Livestock Voice’s launch press release explicitly refers to the EU livestock farming model as, ‘based on diversified, local and family farm structures, [and] is the backbone of EU’s rural areas’. Whether in press releases or policy publications³⁰, Copa Cogeca also leans heavily on rhetoric which projects an image of themselves as supporters of traditional rural communities and defenders of family farms while their policy stances and lobbying activities strongly advocate for policies which benefit the largest (and therefore intensive) farms the most. For example, 80% of CAP subsidies is received by just 20% of farms, a situation which is generally recognised as very unfair yet Copa Cogeca has consistently strived to maintain area-based direct payments regardless of the size or type of farm³¹.

At the supermarket level, meat companies and retailers continue to push a romanticised image of livestock farming. Misleading labelling and marketing present to consumers a distorted representation of farming in Europe. Images of idyllic bucolic landscapes and traditional family farms, misleading descriptions and claims on food labels portraying the sector and its products as natural, traditional and even environmentally-friendly³² are all a common sight on supermarket shelves.

27 **Food Safety Authority of Ireland**, *Guidance Note 29: The Use of Food Marketing Terms*, 2015. (Accessed: 03/06/2026)

28 **Laville, S. & Horton, H. (The Guardian)**, *Revealed: More than 24,000 factory farms have opened across Europe, June 2025*. (Accessed: 03/06/2026)

29 **Eurostat**, *Farms and farmland in the European Union – statistics, April 2026*. (Accessed: 03/11/2025)

30 **Copa-Cogeca**, *Generational renewal (policy page)*. (Accessed: 27/10/2025)

31 **Copa-Cogeca**, *Vision for the Future of EU Agriculture, December 2024*. (Accessed: 03/06/2026)

32 **Changing Markets Foundation**, *Feeding Us Greenwash: An analysis of misleading claims in the food sector, March 2023*. (Accessed: 03/06/2026)

ORGANIC VS CONVENTIONAL

Although organic livestock farming is now often carried out on an industrial scale with large farms, organic farming requires more extensive rearing and more space for animals to express natural behaviours. However, the percentage of meat produced according to organic regulations represents a very small amount of the meat consumed and produced in the EU today:³³

- **Broiler chickens:** 90 % are raised in intensive indoor systems, 5 % in 'less intensive' indoor systems, 5 % in free range systems and just 1 % in organic systems³⁴.
- **Laying hens:** In spite of strong consumer sentiment³⁵ around 150 million laying hens (38%) are still kept in cages, never seeing natural daylight, another 153 million are restricted to barns with no access to the outdoors, with just 6.7% and 15.7% being organic or free range respectively³⁶.
- **Pigs:** Less than 1% of pigs raised for meat are organically produced, meaning that almost all pigs in the EU never see the outdoors as conventional production standards do not require such access³⁷.
- **Cattle:** Just 7.2% and 4.9% of beef cattle and dairy cows respectively are raised organically in the EU³⁸.



For ruminant animals such as beef, sheep and goats, although access to the outdoors is also not a legal requirement, their need to graze means that it is less common to keep such animals indoor year-round even with conventional farming. However, as with other conventionally raised animals bred for meat, their feed is permitted to be both GMO and contain additives (not permitted with organic farming).

33 Román, S., Sánchez-Siles, L.M. & Siegrist, M., The Importance of Food Naturalness for Consumers: Results of a Systematic Review, Trends in Food Science and Technology, September 2017. (Accessed: 03/06/2026)

34 European Parliamentary Research Service, The EU poultry meat and egg sector: Main features, challenges and prospects, November 2019. (Accessed: 03/06/2026)

35 European Commission, European Citizens' Initiative: End the Cage Age. (Accessed: 03/06/2026)

36 European Commission, Market Situation for Eggs – CMO GREX on Animal Products (23 October 2025), October 2025. (Accessed: 03/06/2026)

37 Eurogroup for Animals, Policy briefing on pig welfare, October 2025. (Accessed: 03/06/2026)

38 European Commission (Eurostat), Developments in organic farming, June 2024. (Accessed: 03/06/2026)

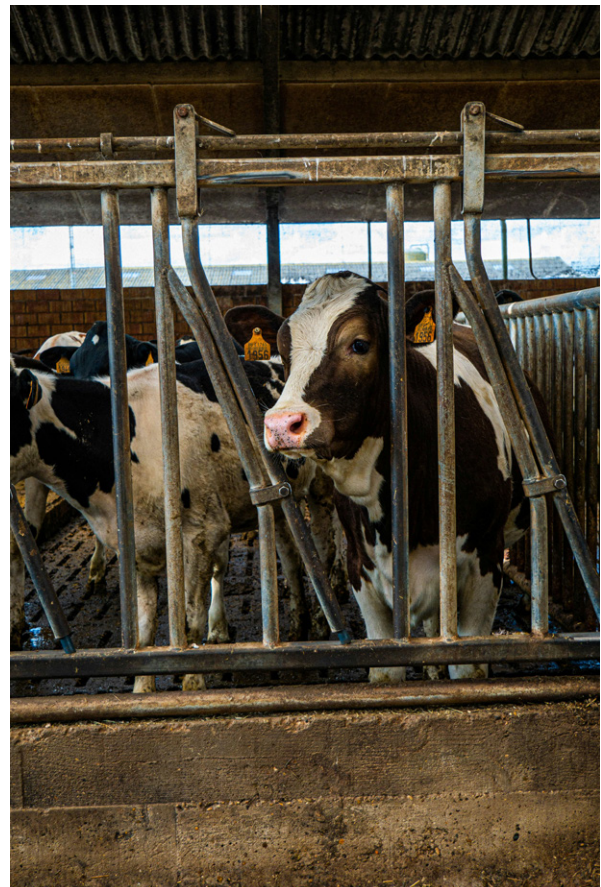
ANIMAL FEED

While food intended for human consumption requires the labelling of any additives or if GMO-produced ingredients are used^{39,40}, conversely this transparency is not required for the feed given to animals raised for meat. In practice, this means that labels on conventional meat bought in the supermarket can allude to supposed traditional or natural characteristics of the product/producer without disclosing to shoppers the nature of what that animal is fed -a central component in meat production.

There are many ways in which the feed given to livestock would challenge consumer expectations of ‘naturalness’ or ‘tradition’, and point to a more ultra-processed diet.

Genetically Modified Feed

Although hardly visible to shoppers in the supermarket, the EU consumer on average indirectly consumes around 60 kilograms of embedded soy per year with their consumption of animal products accounting for 90% of this soy consumption⁴¹. The EU imports significantly higher quantities of high-protein oilseed animal feed than it produces domestically (around 70% is imported⁴²) with self-sufficiency rates for soya being particularly low (just 5%) The vast majority of soya imports come from third countries such as Brazil, Argentina and the US where soybean cultivation is almost entirely GMO⁴³.



European scepticism towards genetically modified food is reflected in the fact that there are virtually no products on European supermarket shelves with GMO-labelled ingredients. Food producers and retailers recognise this strong consumer preference and, given the legal obligation to label the presence of GMO in their products, ensure they produce food without using GMO ingredients.

However, it is not at all evident to the final consumer purchasing eggs, meat, and dairy products that such animal products rely very heavily on GMO feed or that the production of GMO feed for animals is indeed the main driver of genetically modified crop production globally⁴⁴.

39 **European Parliament and Council**, Regulation (EC) No 1333/2008 of 16 December 2008 on food additives, December 2008. (Accessed: 03/06/2026)

40 **European Parliament and Council**, Regulation (EC) No 1831/2003 on the traceability and labelling of genetically modified organisms (GMOs) and the traceability of food and feed products produced from GMOs, 2003. (Accessed: 03/06/2026)

41 **Kuepper, B. & Stravens, M. (Profundo)**, Mapping the European Soy Supply Chain – Embedded Soy in Animal Products Consumed in the EU27+UK, January 2022. (Accessed: 03/06/2026)

42 **European Commission**, DG Agriculture and Rural Development, Feed protein: Overview of EU production and options to diversify sources, May 2024. (Accessed: 03/06/2026)

43 GMO share of national soy crops — **Reuters**, Despite massive production, soy remains niche food in Brazil, October 2024 (Brazil: 98%); **USDA Economic Research Service**, Chart of Note – soybean genetically engineered varieties (USA: over 90%); **FoodNavigator-LATAM**, Non-GMO food market in Argentina: willingness to pay, September 2019 (Argentina: over 99%). (Accessed: 03/06/2026)

44 **Journal of Animal Science**, Estimate that 70–90% of GM crop biomass is consumed by livestock globally (Van Eenennaam & Young), 2014. (Accessed: 03/06/2026)

Additives and Fortification

The use of feed additives in conventional livestock production is very common. According to EFSA, additives are used in animal nutrition to achieve ‘an effect on the feed itself, on the animals, on food products obtained from the animals consuming the feed additive, or on the environment’. They include: technological additives such as preservatives, antioxidants, emulsifiers, acidity regulators, silage additives, sensory additives such as flavours or colors, nutritional additives such as vitamins or amino acids as well as zootechnical additives. In fact there are over 1400 authorised feed additives in the EU⁴⁵, compared to just over 300 additives approved for use in food.

Indeed, while meat and dairy lobbyists often deride plant-based alternatives for requiring fortification e.g. calcium or Vitamin B12 for plant milks, the intensive nature of the vast majority of commercial farming in the EU also often necessitates fortifying animal feed with vitamins such as B12.⁴⁶ Despite the common usage, and unlike additives added to food for human consumption, these feed additives do not have to be declared on the label for the consumer.

⁴⁵ **European Commission**, [EU Register of Feed Additives \(Food and Feed Information Portal\)](#), (Accessed: 03/06/2026)

⁴⁶ **FEFAC**, [EU vulnerability for the sourcing of essential feed additives, September 2025](#), (Accessed: 03/06/2026)

Meat Decontamination Washes

Although not directly a feed additive, it is worth noting that lactic acid used as a meat decontamination wash has been permitted on bovine carcasses since 2013, just before TTIP negotiations and debates began⁴⁷. During the TTIP trade discussions between the US and the EU, the threat of chlorinated chicken imports became one of the most salient and important concerns for consumers, representing a threat to the EU’s ‘farm to fork’ food safety approach in favour of the US approach of disinfecting meat at the end of the production process instead. The push for lactic acid washes on beef was in fact requested by the US Department of Agriculture⁴⁸ and, given the public reaction to potential chlorine washes during TTIP discussions, it is questionable as to whether lactic acid washes for beef would have been approved post-TTIP. As with additives, meat decontamination washes do not have to be labelled for the consumer.

Deforestation

The EU’s livestock sector’s demand for feed, particularly soy and maize, plays a major role in driving deforestation in third countries. Vast areas of rainforests are cleared to grow feed crops that sustain Europe’s intensive meat and dairy industries⁴⁹. This process often displaces local communities and destroys biologically-rich ecosystems. Yet, naturally such significant impacts will not be visible to a consumer in the supermarket.

⁴⁷ **European Commission**, [Commission Regulation \(EU\) No 101/2013 of 4 February 2013 concerning the use of lactic acid to reduce microbiological surface contamination on bovine carcasses, February 2013](#), (Accessed: 03/06/2026)

⁴⁸ **European Food Safety Authority (EFSA)**, [Mandate received from the European Commission regarding the application dossier from the U.S. Department of Agriculture](#), (Accessed: 03/06/2026)

⁴⁹ **Eurogroup for Animals**, [Trade in animal products fuels deforestation, June 2022](#), (Accessed: 03/06/2026)

MEAT: "TRADITIONAL" AND "NATURAL"?

Sensory additives –
colourings and
flavourings

Antibiotics
like Penicillins

**Lactic acid
washes**
(beef only)

**Imported
genetically
modified soy**
(GMO)

**Technological
additives –**
Emulsifiers,
Stabilisers
and Thickeners

**Zootechnical
additives –**
Digestibility
enhancers

**Nutritional
additives –**
fortification with
vitamins,
'pro-vitamins
e.g. B12



**Illusions of Tradition
and Naturalness**

ANIMAL WELFARE IMPLICATIONS OF CURRENT PRODUCTION

While the EU has some of the highest levels of animal welfare globally these standards are nevertheless significantly outdated and are neither in line with scientific advice⁵⁰ nor consumer expectations for whom animal welfare is very important⁵¹.

Indeed, the industrialisation of meat production over the past century is characterised by high-density, intensive confinement as well as genetic selection for faster-growing breeds. The resulting poor welfare would not be considered as ‘natural’, ‘traditional’ or even acceptable in the eyes of citizens. Key relevant aspects which confront the industry’s self-portrayal as ‘traditional’ or ‘natural’ include:

- The inability of animals to express natural behaviours due to confinement in inadequately sized spaces
- Routine mutilations such as beak trimming or tail docking
- Genetic selection leading to unnatural growth rates, litter production etc.
- Use of pharmaceutical products or feed additives
- The mass culling of male day-old chicks in egg production⁵²

50 **European Food Safety Authority (EFSA)**, Animal welfare (topic overview – EFSA’s role). (Accessed: 03/06/2026)

51 **European Commission**, Special Eurobarometer 533 on Animal Welfare – Report, October 2023. (Accessed: 03/06/2026)

52 **European Commission**, Special Eurobarometer 533 on Animal Welfare – Report, October 2023. (Accessed: 03/06/2026)

At the same time, there is a significant lack of transparency towards consumers on animal welfare, with very few consumers aware of current welfare practices in general or the controversial yet routine practices such as mutilations or culling. When shopping at the supermarket, consumers cannot tell how well, or poorly, the animals were actually treated, and stricter EU-wide legal requirements are currently lacking to ensure that all farm animals are kept in good conditions and remain healthy.

ENVIRONMENTAL IMPACTS

The impacts of current livestock production practices on the natural environment are undeniable. Pollution to EU water bodies and air have been directly linked to how meat is being produced. As the latest five yearly report on the State of the EU Environment by the European Environment Agency puts it, ‘Biodiversity is declining across terrestrial, freshwater and marine ecosystems in Europe due to persistent pressures driven by unsustainable production and consumption patterns, most notably the food system.’⁵³

- **Air:** Gas released from animal waste and the use of fertilisers is a major source of ammonia air pollution – agriculture accounts for 93% of ammonia emissions⁵⁴.
- **Water:** Intensive meat production is a major source of nitrate and phosphate pollution in the EU, especially from slurry and manure runoff.

53 **European Environment Agency**, Europe’s environment and climate: knowledge for resilience, prosperity and sustainability (EEA report 11/2025), September 2025. (Accessed: 03/06/2026)

54 **European Environment Agency**, Air pollution in Europe: 2024 reporting status under the National Emission reduction Commitments Directive (Briefing No 07/2024), 2024. (Accessed: 03/06/2026)



THE EU DAIRY SECTOR: TRADITION AND NATURALNESS UNDER SCRUTINY

The EU's dairy farmers produced an incredible 160 million tonnes of milk in 2022, 94 % of which was delivered to dairies where raw milk is processed into products such as cheese or butter⁵⁵. As one of the world's largest milk producers and with half of the world's top dairy companies being EU-based, the impact of the EU's dairy sector is unquestionably significant for health, climate and the environment.

At the same time, many of the narratives deployed by the meat industry surrounding nutrition, tradition and 'naturalness' are equally engaged by the dairy lobby, one of the most powerful agri-food sectors in Europe. These narratives are also pushed on consumers via advertising terms, social media marketing, and even imagery on dairy product labels.

Unfortunately, as with the meat sector, the dairy sector appears to work much harder at creating an image of sustainability and 'tradition' than it does in achieving it.

Indeed, as with other livestock sectors, the dominant reality of dairy production in the EU today is one of industrialisation, consolidation and intensification, which stands in stark contrast to this carefully cultivated image. Over 80% of European milk production is in intensive dairy farms characterised by large herds, restricted housing, concentrated feed and advanced technologies to increase the supply of milk⁵⁶. As the sector has intensified, so too has it consolidated. While concepts of small, pasture-based family farms are favoured by the industry in its communications and labelling, the reality is that the number of dairy farms has declined⁵⁷ and large, intensive operations are the norm rather than the exception⁵⁸.

⁵⁵ **European Parliamentary Research Service**, *The EU dairy sector: Main features, challenges and prospects (EPRS Briefing)*, July 2024. (Accessed: 03/06/2026)

⁵⁶ **Airhoun, M., Gauly, M. & Zanon, T.**, *Transitioning toward sustainable dairy systems in Europe: A systematic literature review*, *Journal of Dairy Science*, Vol. 108, Issue 11, pp. 12373–12390, 2025. (Accessed: 03/06/2026)

⁵⁷ **European Union**, *Milk sector in the European Union — 30 years of quotas (Agriculture, forestry and fishery statistics)*, 2015. Data showing the decrease from 1,514,441 to 288,600 dairy farms in the EU 10 between 1983 and 2013, representing an 81 % reduction (≈1.2 million farms). (Accessed: 03/06/2026)

⁵⁸ *Market Data Forecast, Europe Dairy Market*. (Accessed: 03/06/2026)

Consumption

Dairy lobbyists, such as the European Dairy Association, play heavily on the naturalness of milk and dairy, in particular choosing to contrast it with the supposed ‘artificialness’ of plant-based beverages⁵⁹. While it is true that such plant-based products require fortification with vitamins and minerals e.g. calcium or vitamin B12, the nutritional purity and ‘naturalness’ of dairy production and consumption is somewhat overplayed when considering both the wide range of dairy products actually consumed today and the production and feeding processes behind dairy products, not to mention the serious environmental and climate impacts of such intensified production.

Indeed, the recent Lancet review paper on ultra-processed food included dairy as one of the ten top UPF categories⁶⁰. Ultra-processed cheese slices, flavoured dairy drinks and yoghurts as well

as dairy desserts commonly use additives, sweeteners, stabilisers and colourings in their recipes. At the same time liquid milk consumption continues its downward trend and accounts for just a small percentage of milk production⁶¹.

As with meat, the industrial nature of dairy production relies heavily on external inputs that remain largely invisible to consumers. While the diet of a dairy herd varies depending on different factors such as region, concentrated feed containing imported cereals such as soy is a key component of a dairy cow’s diet in the EU, much of it genetically modified and linked to deforestation in third countries. Though legal, feed additives as well as productivity-enhancing practices are routine features of conventional dairy systems, yet none of this is reflected on product labels which can often emphasise purity, nature and tradition.

⁵⁹ **European Dairy Association**, [Milk vs Plant-based beverages \(Q&A\)](#), November 2021. (Accessed: 03/06/2026)

⁶⁰ **Monteiro, C.A. et al.**, [Ultra-processed foods and human health: the main thesis and the evidence](#), *The Lancet*, Vol. 406, Issue 10520, pp. 2667–2684, 2025. (Accessed: 03/06/2026)

⁶¹ **European Dairy Association**, [Annual Report 2024/25, 2025](#). (Accessed: 03/06/2026)

Animal Welfare

As EFSA's recent scientific opinion on dairy cows highlighted, current practices in dairy farms pose numerous animal welfare concerns for the animals. High-yielding cows are bred for maximum productivity, resulting in significant health issues such as lameness, mastitis and reduced lifespans. Only a small minority of dairy cows are kept in a purely pasture-grazing system⁶². Routine practices, including the separation of calves from their mothers shortly after birth, the culling of male dairy calves and even tethering of cows are still allowed in EU countries⁶³. This is in direct contradiction to the pastoral imagery used to market milk and dairy products. These practices are still not meaningfully addressed by EU regulation.

Environment

Environmentally, intensive dairy farming contributes substantially to greenhouse gas emissions, ammonia pollution and nutrient runoff affecting air and water quality. While organic and pasture-based dairy systems offer more extensive and welfare-friendly alternatives, they account for only a small share of total EU production⁶⁴. Moreover, even in countries where

pasture-based production is the norm, such as Ireland, dairy intensification and the sheer number of dairy cows per hectare has led to significant environmental impacts and is a main driver of ammonia pollution in the country⁶⁵.

Nevertheless, the EU dairy industry still promotes a misleading environmentally-friendly image of its sector which significantly obscures dairy's substantial climate impacts leading to accusations of greenwashed messaging. For example, in 2022, a Swedish court banned Arla Foods, one of the largest EU dairy companies, from using "net-zero climate footprint" claims in its marketing as the language misled consumers that its products had no climate impact or were fully offset, which the court found unsubstantiated⁶⁶.

As with meat, the dairy industry's appeal to tradition, naturalness and pastoral purity functions primarily as a defensive narrative, obscuring the realities of modern production. Meaningful progress towards healthier, more sustainable diets will require confronting these myths and reassessing the long-term privileged status afforded to dairy in European food policy.

⁶² **EFSA Panel on Animal Health and Animal Welfare (AHAW)**, Scientific Opinion on the welfare of dairy cows, EFSA Journal 2023;21(5):7993, 2023. (Accessed: 03/06/2026)

⁶³ **Expertise for Animals**, Current legal situation of tethering cattle. (Accessed: 03/06/2026)

⁶⁴ **European Commission – EU Milk Market Observatory**, Minutes of MMO Economic Board meeting (28 March 2023), March 2023. (Accessed: 03/06/2026)

⁶⁵ **Environmental Protection Agency (Ireland)**, Ireland's Air Pollutant Emissions 1990–2030, May 2023. (Accessed: 03/06/2026)

⁶⁶ **Greenpeace**, Dairytales: Arla's Smokescreen for its lack of climate action, February 2025. (Accessed: 03/06/2026)



CONCLUSION

The modern EU meat and dairy production system, including both fresh and processed products, is far removed from the traditional or natural image promoted to consumers and policymakers by industry narratives. Marketing and lobbying rhetoric conceal the reality of an EU livestock sector which is almost exclusively defined by intensive farms dependent on high inputs including feed additives and GMO feed which necessitate significant environmental and welfare compromises.

Ultimately, the myth of traditional, natural meat and dairy serves industry interests rather than the consumer or the environment. Recognising and confronting these fictional attributes and providing more transparency towards consumers will be essential for meaningful reform in European food systems.





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