



# **Animal Welfare at the intersection of Politics, Policy, Profit & People**

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# National Brands Backed by Regional Brands

Dean is the only producer with a national footprint and the ability to launch fresh milk national brands

DairyPure®

TruMoo®



# FAST FACTS



**Purchase 1 in 10  
tankers**

**400,000  
tankers  
Annually**

**1,100  
tankers/day**

**45  
tankers/hr**

**Receive 1  
load every  
80 seconds**

**Over 5,000  
farms contribute  
to our supply**

**Nearly 1  
Million cows  
work to  
produce the  
milk we buy**



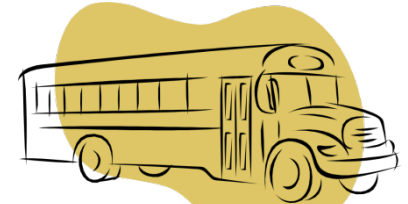
# The Job



# Customers



Source: Internal sales data. Based on 2014 Volume.



Large Format 61%

Small Format 12%

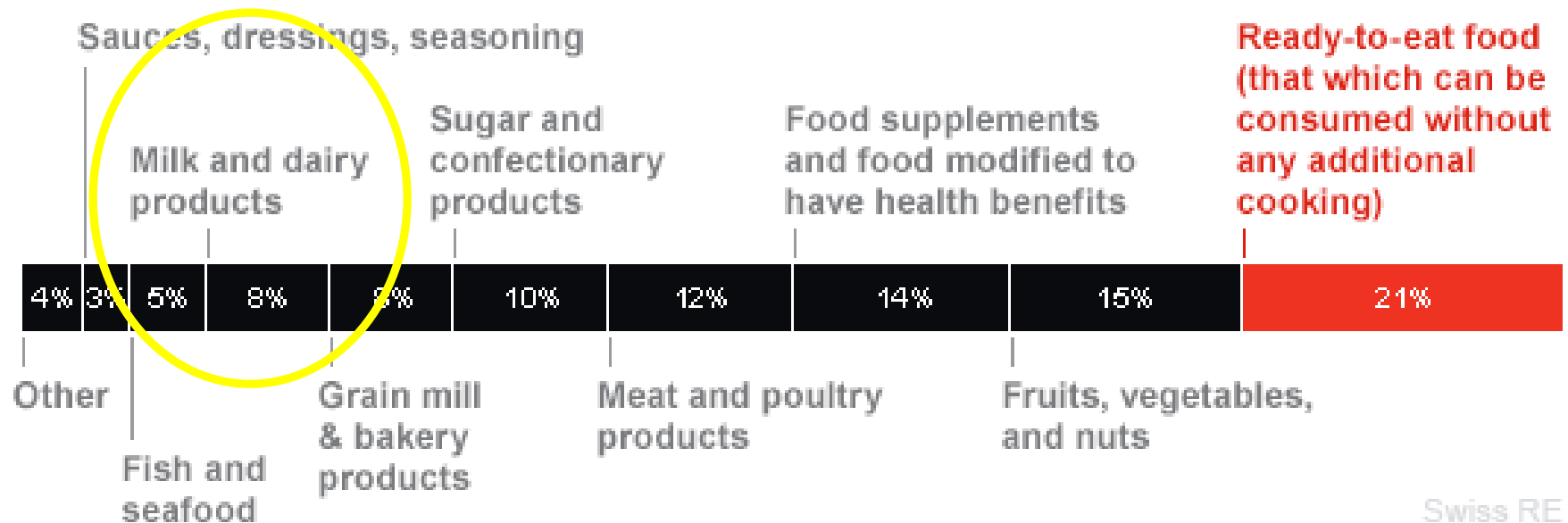
Foodservice 13%

School/Other 14%



# What Keeps you up at night?

## FOOD MOST AFFECTED BY RECALLS



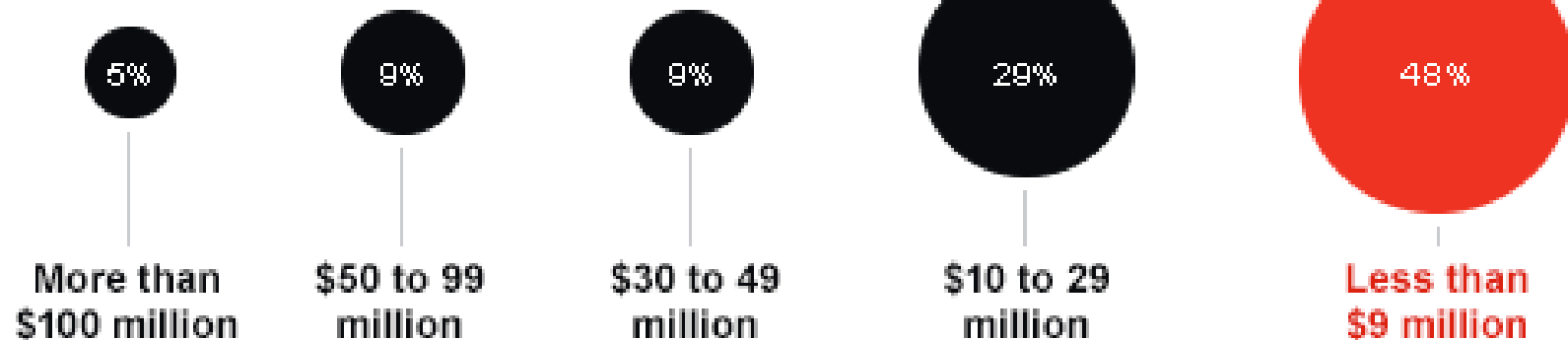
Swiss RE

# What Keeps you up at night?

## RECALL COST TO BUSINESS

Estimates includes direct cost and loss of profit (U.S.)

Swiss RE; Grocery Manufacturers Association





# It Takes A Lifetime To Build A Reputation

And 1 second to Ruin it!







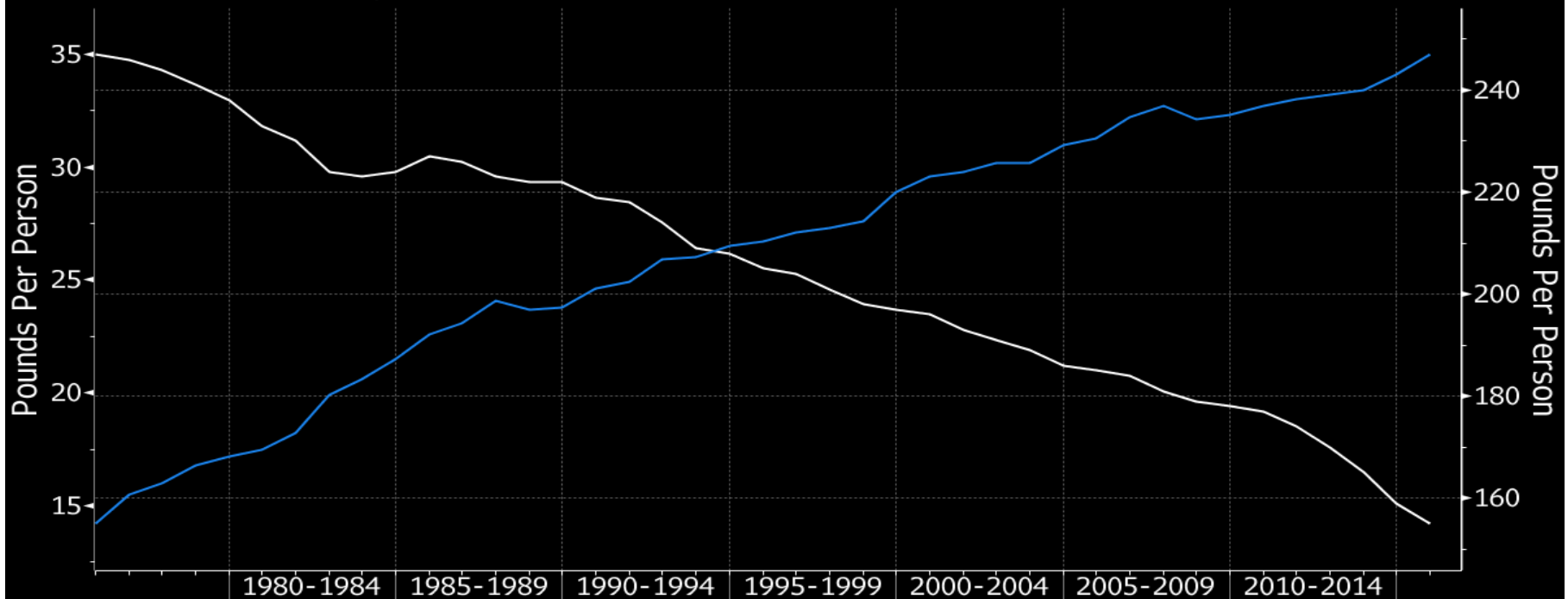
# Conventional White Milk

Total domestic consumption of fluid milk has tumbled for six straight years and is forecast to drop again in 2017

## Pizza People

While Americans drink a lot less milk, they can't seem to get enough cheese

■ Milk Demand (R1) ■ American, Other Cheeses (L1)



Source: U.S. Department of Agriculture

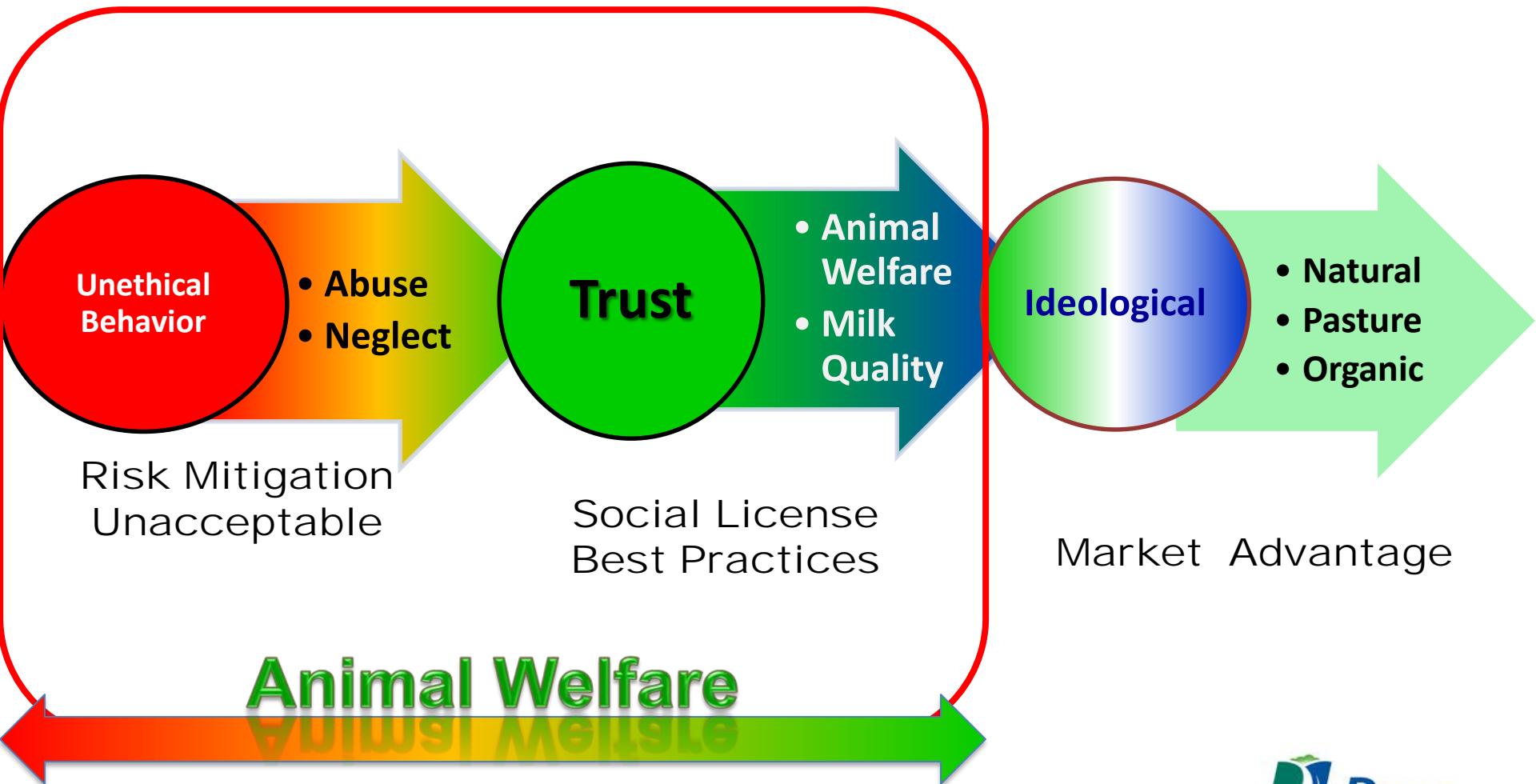
Bloomberg



# Why Animal Welfare Matters

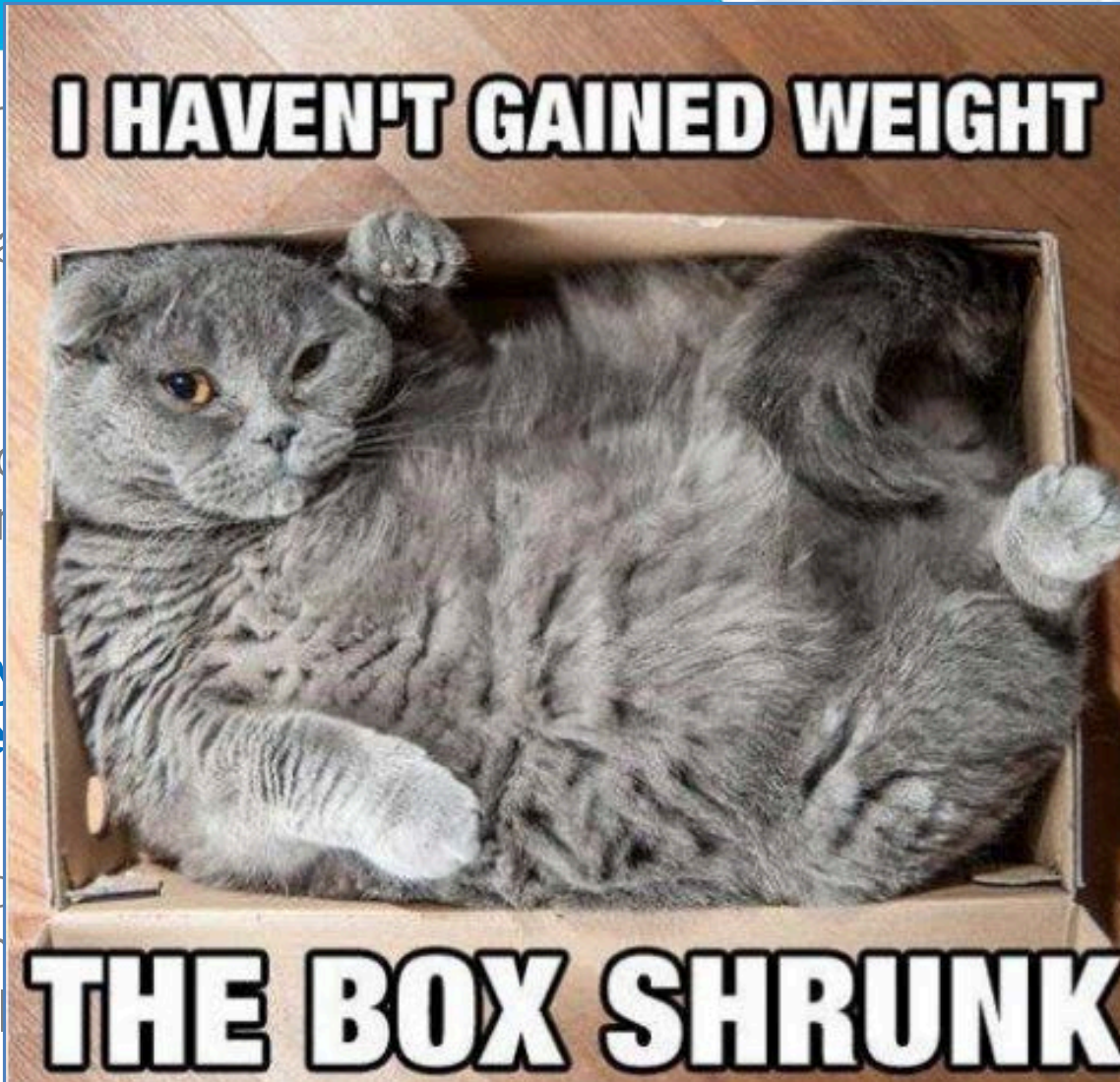


# Brand Management Continuum



# The Current Environment

- Consumer health and wellness
- Specialized advanced nutrition with functional ingredients
- **Industry consolidation** are merging
- This allows custom solutions and will



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evolve

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brands  
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that we

pressure  
certainty





# What are you talking about??



**Trust, but verify.**  
– Ronald Reagan

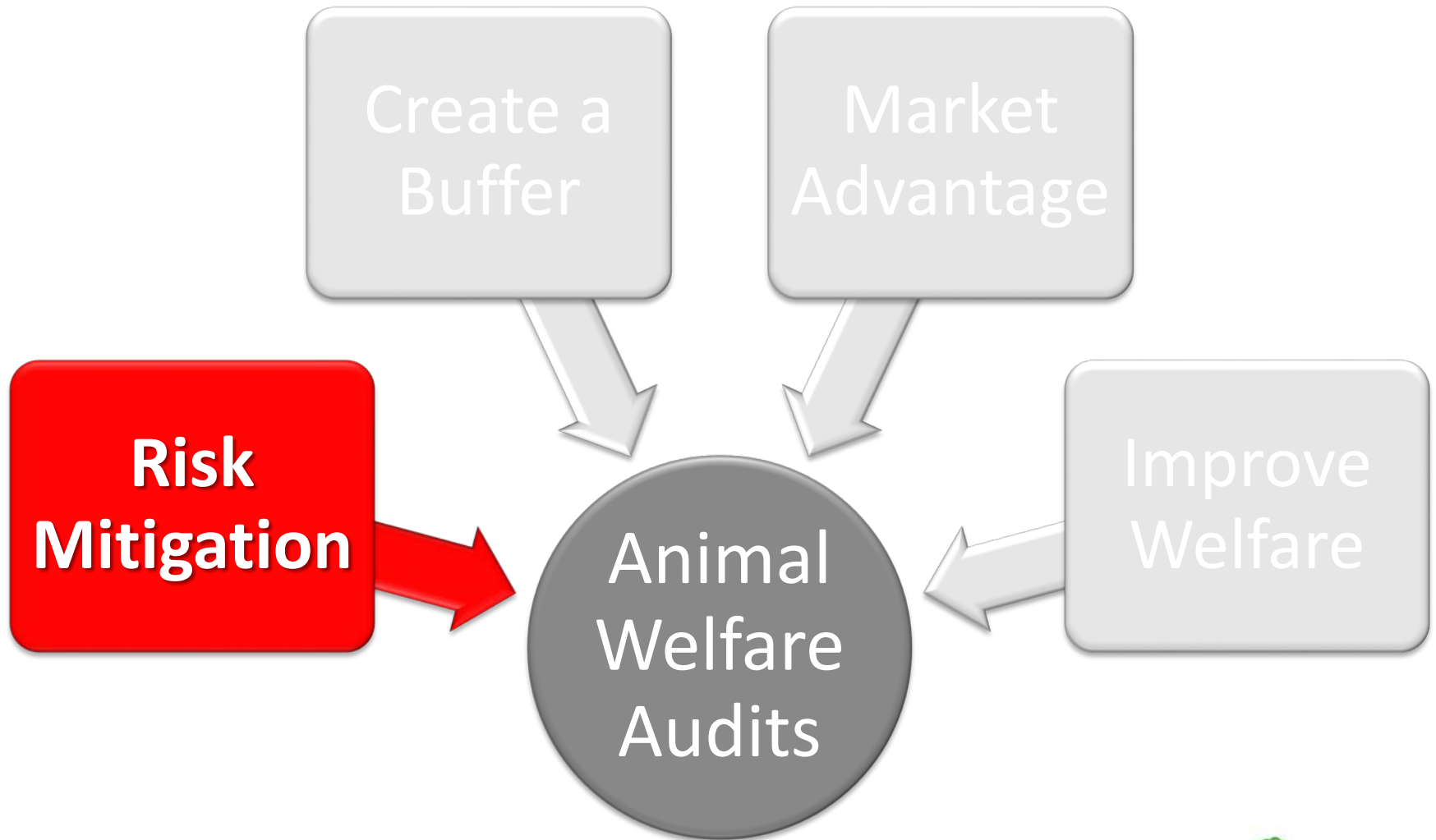




# Animal Welfare Audit Motivations



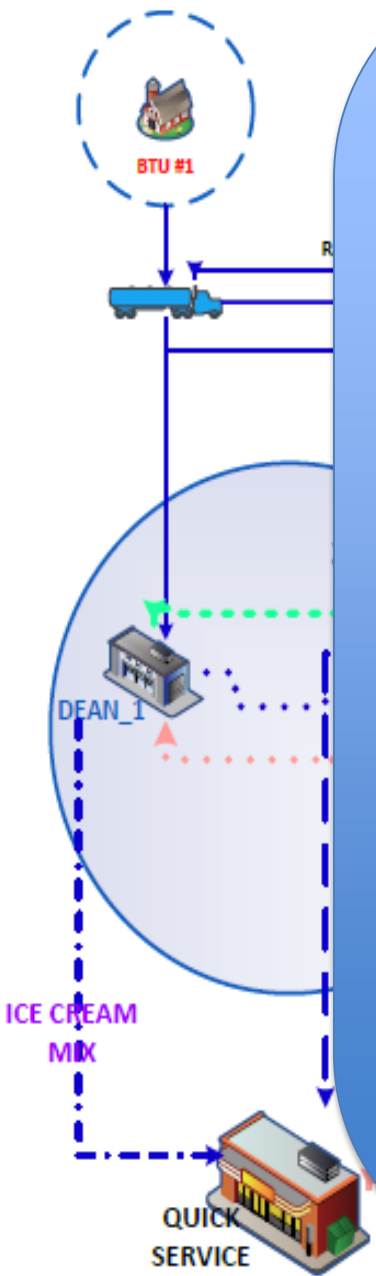
# Animal Welfare Audit Motivations



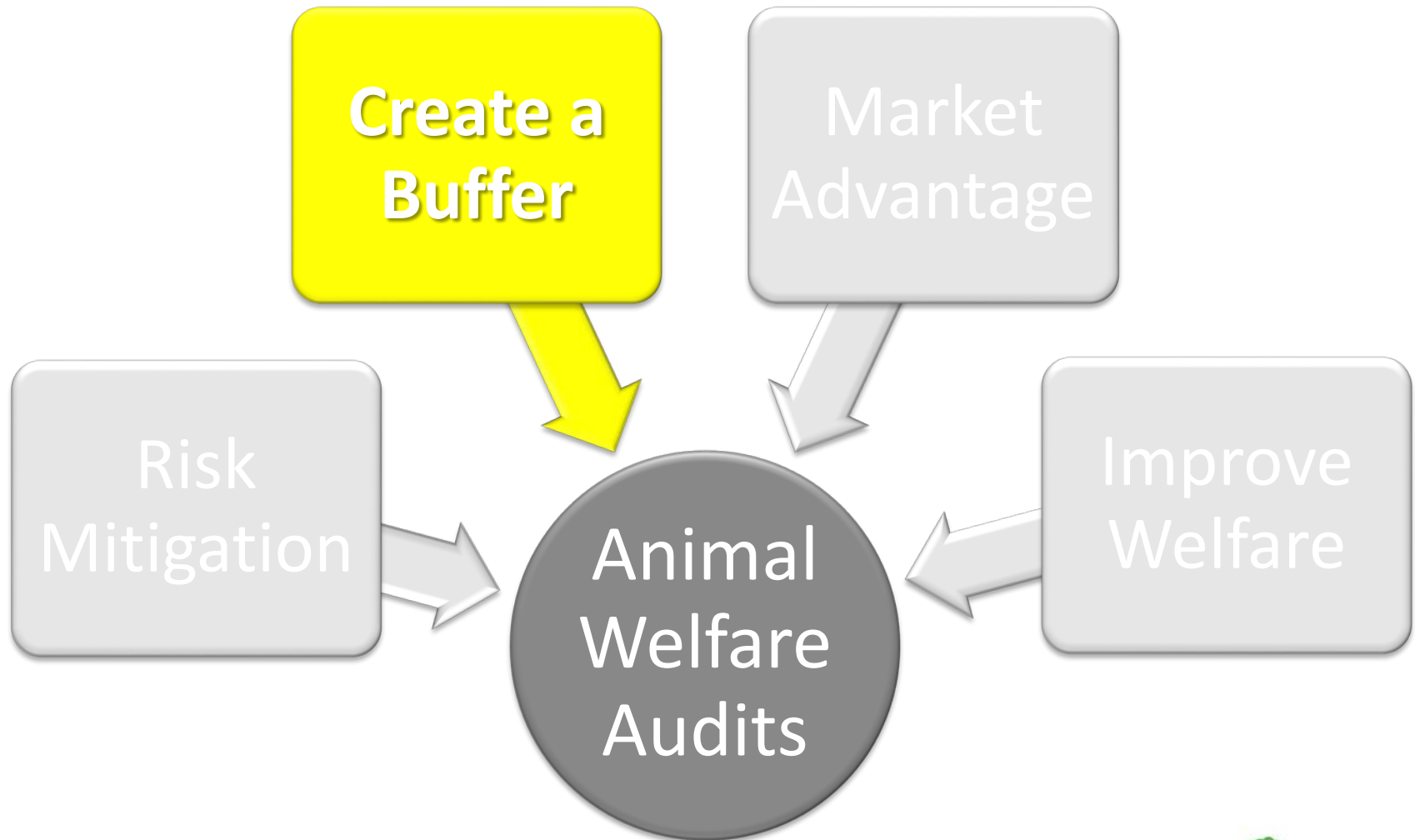
# Risk Mitigation



- Identify the high risk farms and remove them
- How?
  - Create Standards and Rules and require compliance
- What works?
  - Measurable Standards that are consistently enforced along entire supply internally with external 3<sup>rd</sup> party audits
- What doesn't?
  - Pushes farm out of field of view, **doesn't improve welfare**
  - Poor definition of "RISK"
  - Tend to ignore major welfare issues
  - Creates NEW problems - competition



# Animal Welfare Audit Motivations



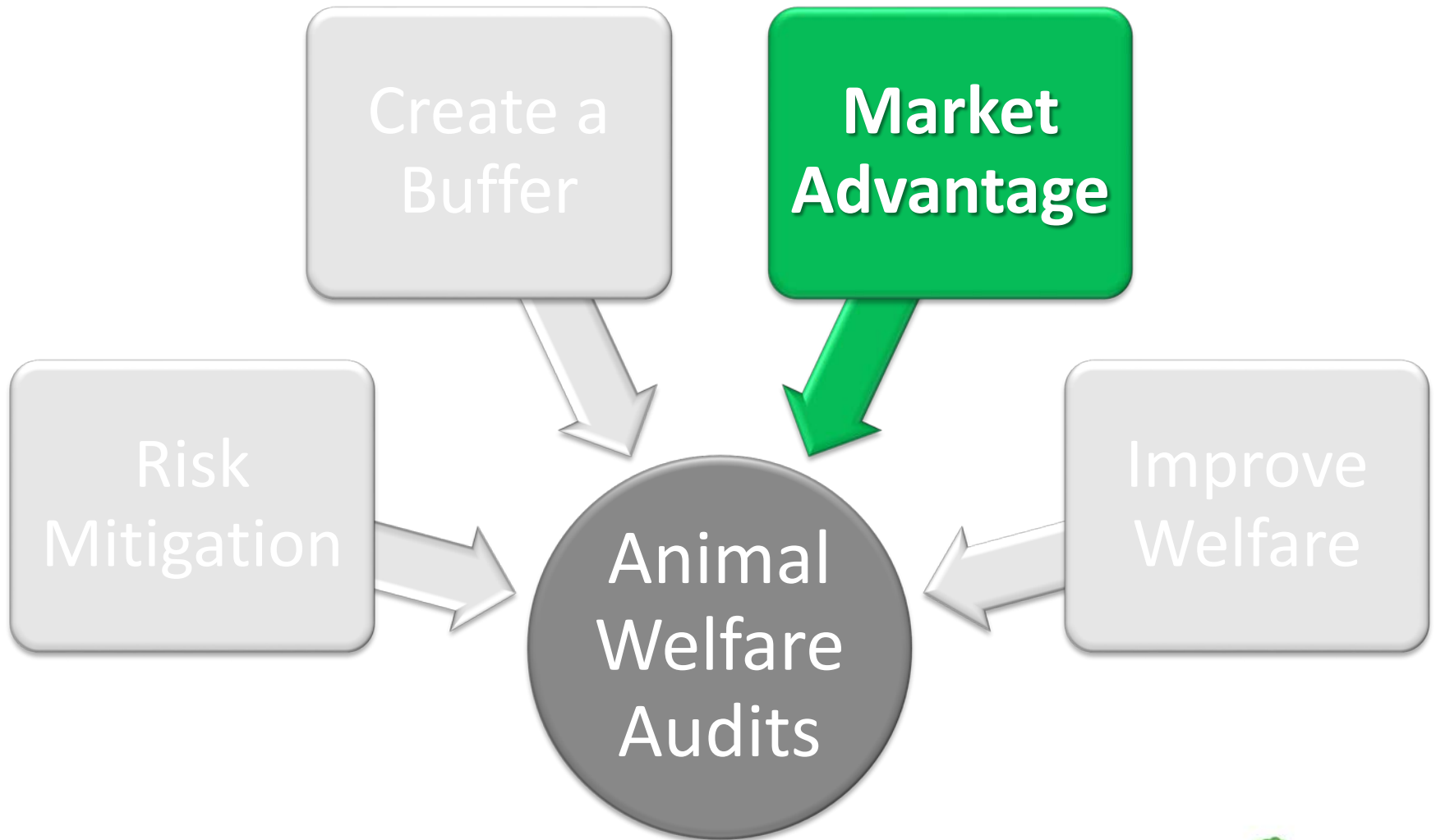
# Create A Buffer



- ✓ Establish a “program” with limited if any enforcement, communicate principles broadly
- **What works?**
  - Establishes a facade of assurance
  - May provide the opportunity to ID HIGH RISK FARMS
  - Establish “CAUSE” – when something goes wrong the farm is dropped
- **What doesn't work?**
  - 1<sup>st</sup> party, herd vet self reporting
  - Doesn't actually mandate improvement
  - Does not offer the farm any protection
  - Establishes an expectation!!!



# Market Advantage



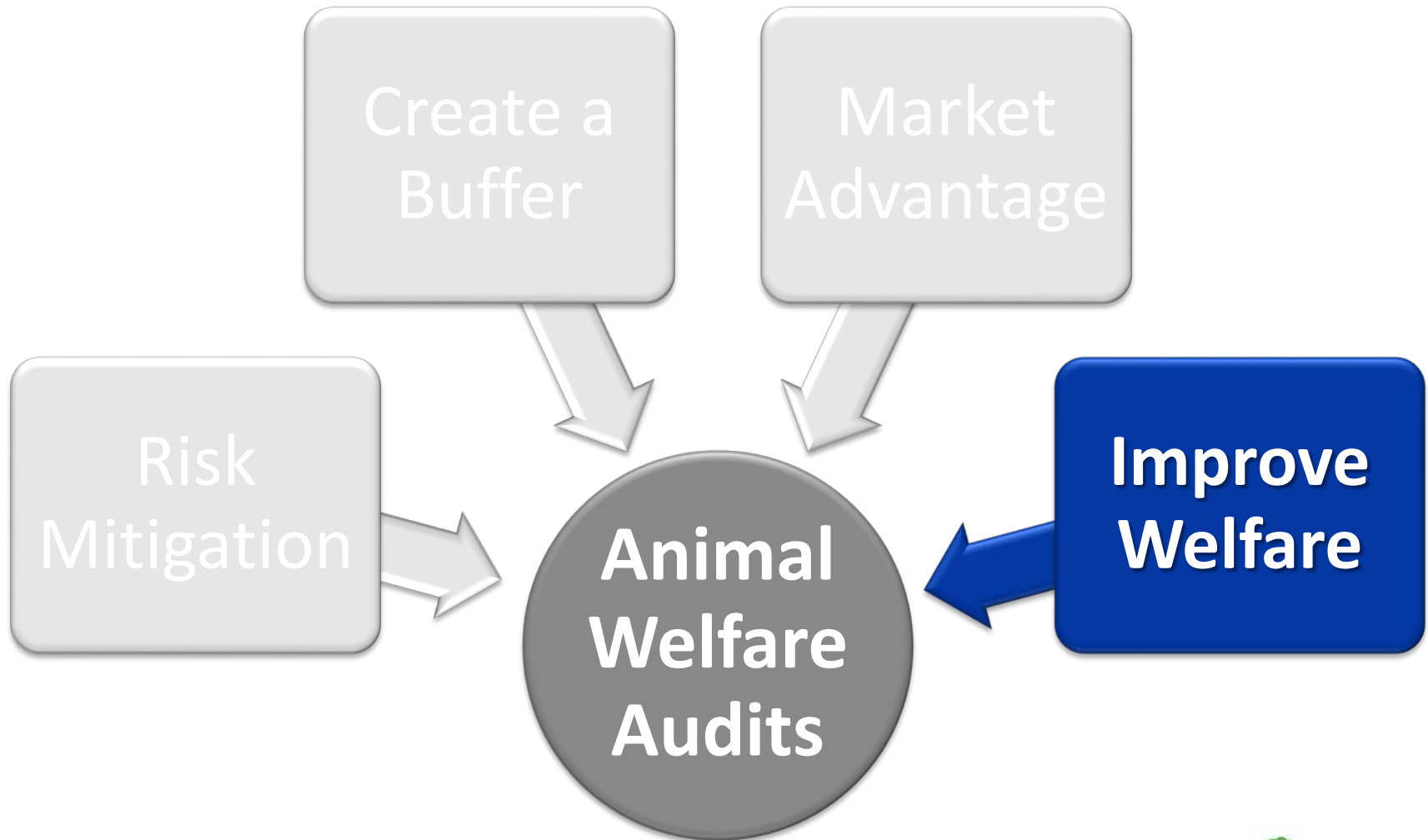
# Market Advantage



- ✓ Develop a certification or “label”
  - Establish claims
  - Audit against claims
- **What works?**
  - Establishes a standard that must be adhered to
  - Requires more than just 3<sup>rd</sup> party verification
  - Certified auditors
- **What doesn't?**
  - Requirements often focus on consumer perception rather than animal welfare
  - Who set's the standards? Transparent?
  - Tends to provide an opportunity to farms that are already doing well...doesn't actually improve welfare, merely verifies it
  - All you need is 1 good day!!! Auditor Consistency ???



# Animal Welfare Audit Motivations



# Improve Welfare



- Develop a program that requires continual attention to animal welfare
- Standards developed by animal welfare experts in that species with input from **all stakeholders**
- Standards set to a **high bar**, not the average or a “minimum standard”
- 2<sup>nd</sup> Party Assessment identifies problem areas and requires a corrective action plan (CAP)
- Follow up to ensure CAP’s are being implemented
- 3<sup>rd</sup> Party Auditing to verify integrity of reporting at the farm level
- **Accept single national format**

# Improve Welfare



- What works?
  - Compliance is mandated throughout supply chain – **avoid pushing farms out of sight**
  - 2<sup>nd</sup> & 3<sup>rd</sup> Party Assessment performed by licensed professional
  - Licensing requires **sufficient training and shadowing to demonstrate competence**
  - Able to provide feedback and direction (true 2<sup>nd</sup> party)
  - Milk buyer is responsible for the integrity of the program
  - Develops chain of evidence
- What Doesn't Work ?
  - Poor or no follow up
  - **No data to prove efforts have been made**
  - Poor training –agreement among evaluators is critical



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# Leadership Position



## F.A.R.M.

- Require – 1 year
  - VCPR
  - CCEA
  - Tails
- Every 3 years



## Dairy Stewardship

- Require F.A.R.M. +
  - Critical Areas
  - Records
  - Drugs list
  - Training
  - Humane Euthanasia
  - Down cow care
  - Dehorning
- Re check 6mos – 2 years

# Early Results

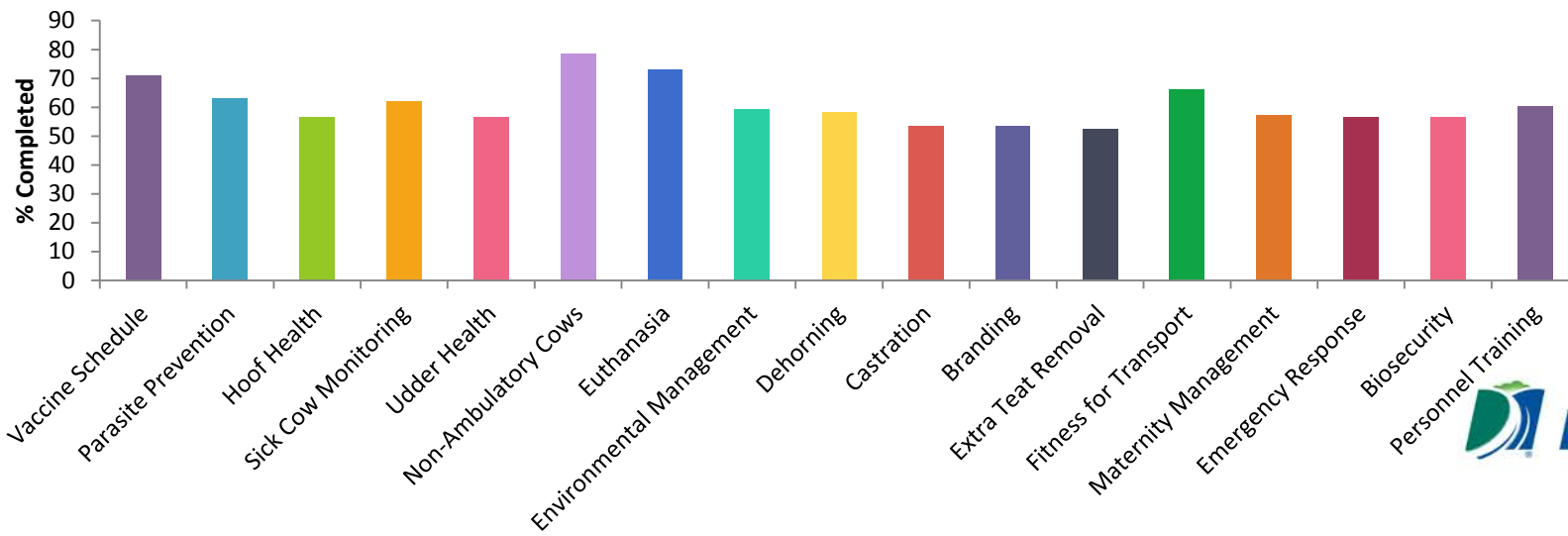


## Started Jan 2016

- 203 On-Farm Audits completed
- 38% of farms scored in the top (2 year re-check)
- 49% of farms scored in the middle (1 year re-check)
- 13% of farms scored in the bottom (6 month re-check)

## 10 Farms already re-evaluated based on performance

- 7/7 Corrected Cow Care Agreement
- 6/10 Now using NSAIDs for dehorning
- 9/10 Moved from bottom to middle benchmark!!!



$$P = (K + S) \times A$$

Performance = (Knowledge + Skill) x Attitude

## DVM & Farmer Training in Kentucky March

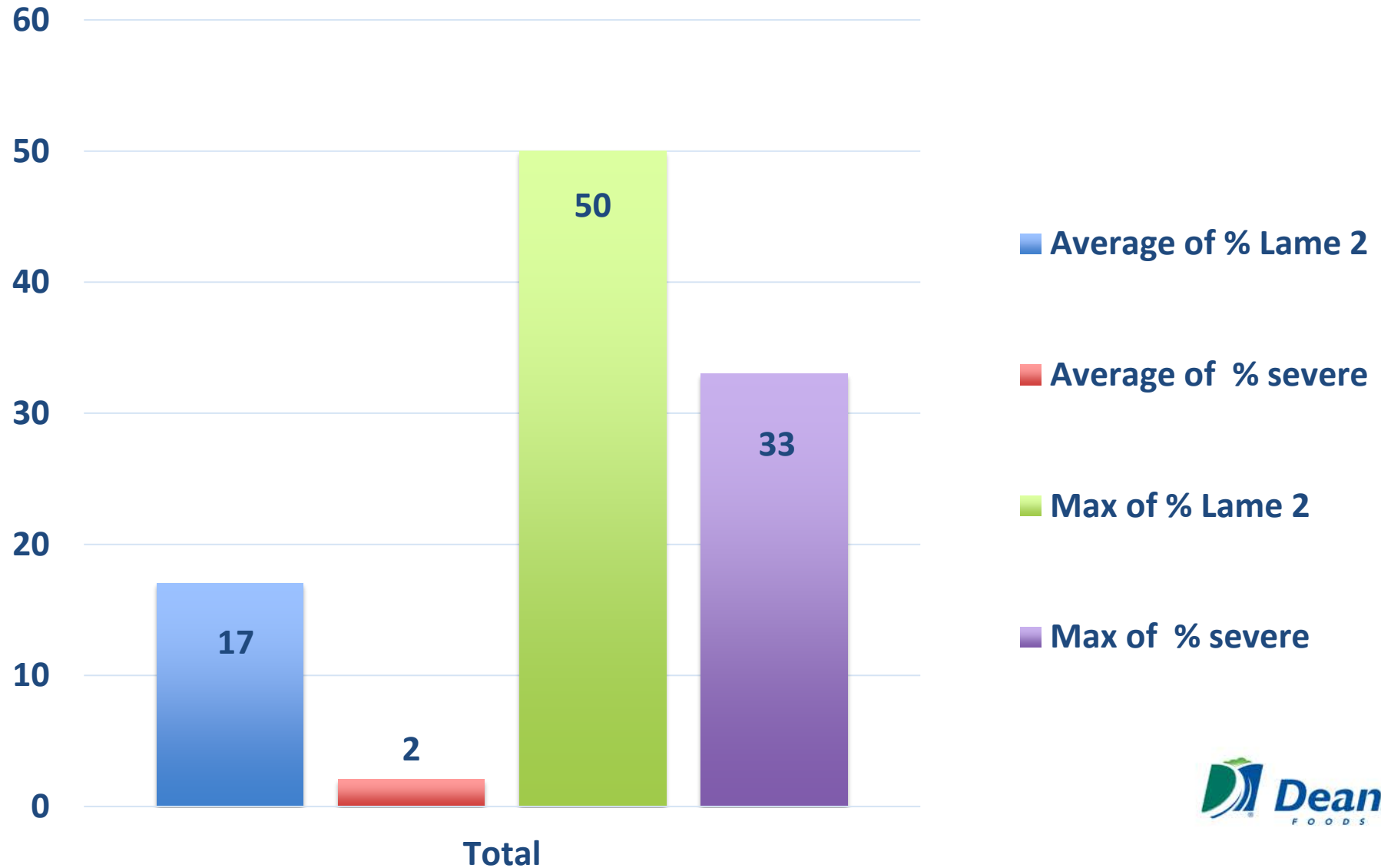
74 Farmers

- ✓ Dehorning Demo – Paste/Local/NSAIDs
- ✓ Down Cow Protocol workshop
- ✓ Humane Euthanasia
- ✓ Milk Quality
- ✓ Lameness

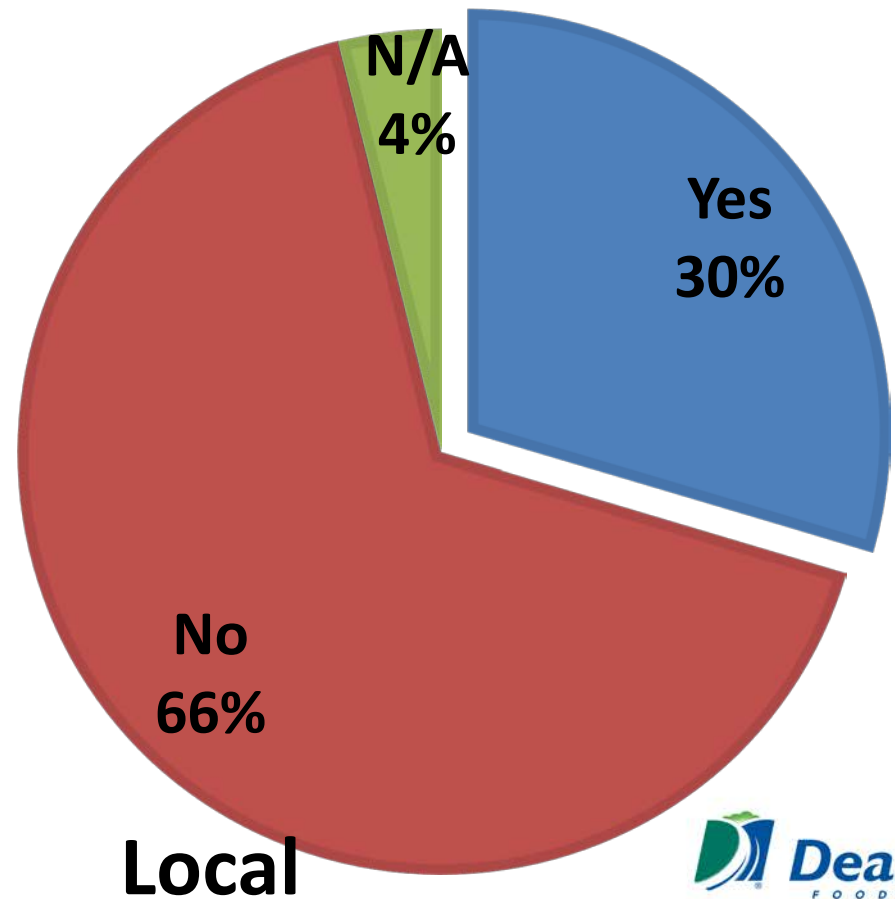
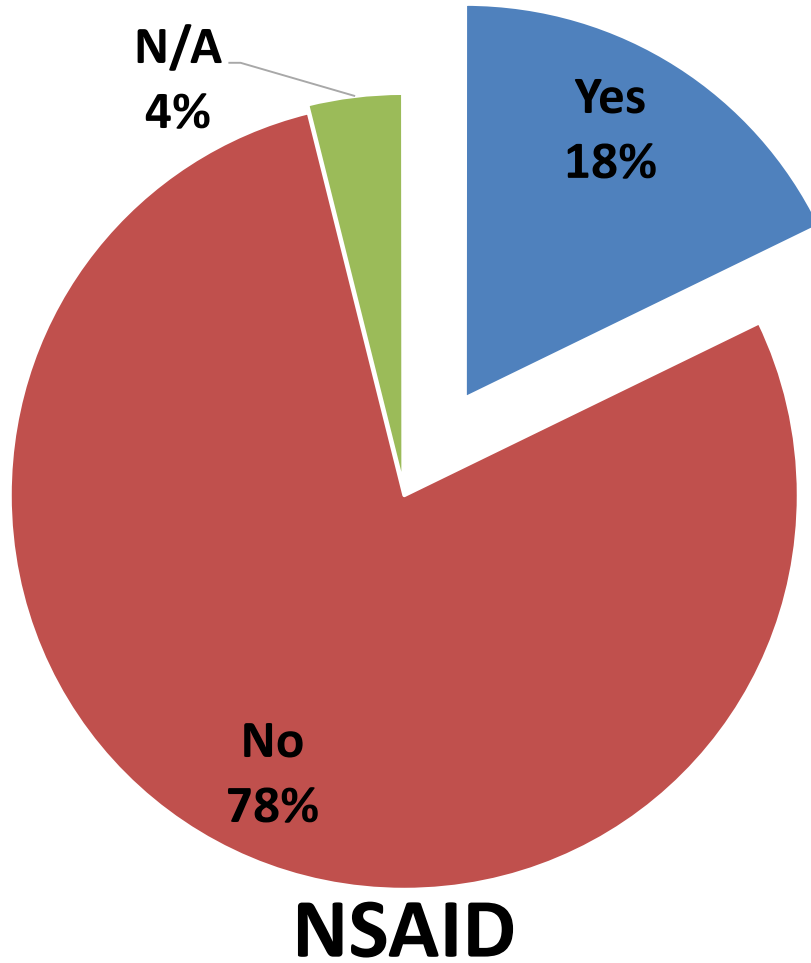
Local DVMs & Industry Experts



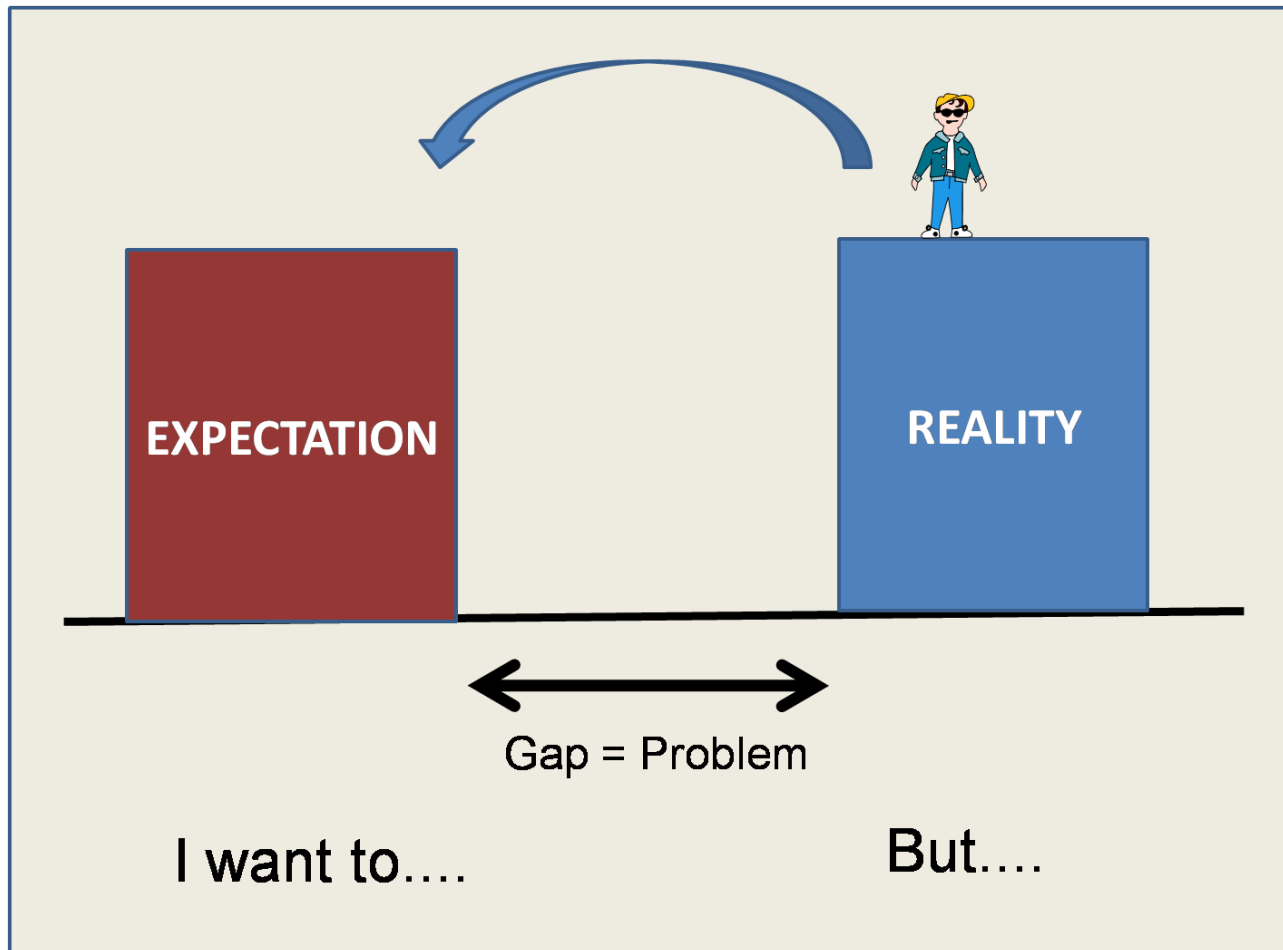
# Lameness



# Dehorning



# Mind the GAP!





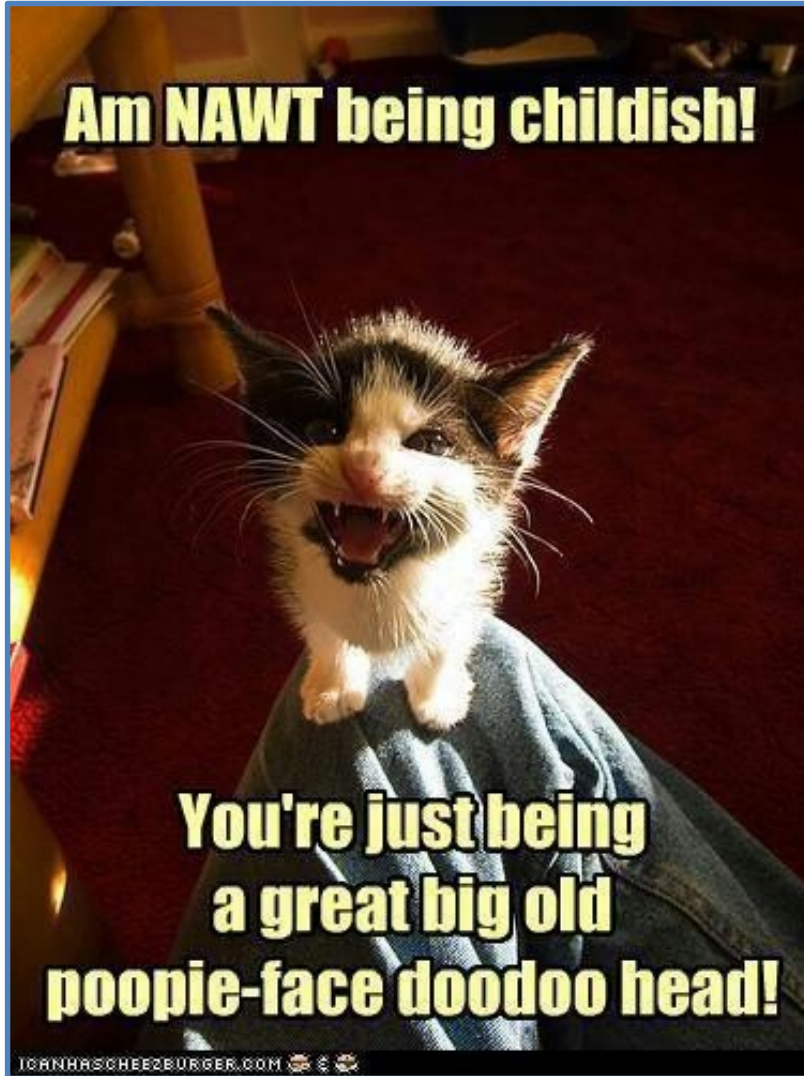
# What I Need to Hear and See



- We each accept our responsibility and will be held accountable
- When you make a mistake you own it
- I need to see that you care, not just hear that you care



# What I Don't Want to Hear or See



***It is better to  
offer no excuse  
than a bad one.***

***~George  
Washington***

# Excuse #1



- **Blame** - We fired the worker



I accept the responsibility but not the blame. Let me explain the difference. Those who are to blame lose their jobs. Those who are responsible do not.

(David Frye)

izquotes.com



# Everything happens through people



# Excuse #2



- Blame
- **It was staged!**



**It's easy to say "It wasn't me"**

Courage is blaming your older brother...

Demotivation.us

# Excuse #3



- Blame
- It was staged!
- We just need to educate the public





You do the best you can until you  
know better.

And then when you know better,  
Do Better

Maya Angelou