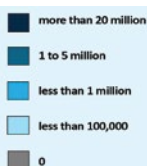
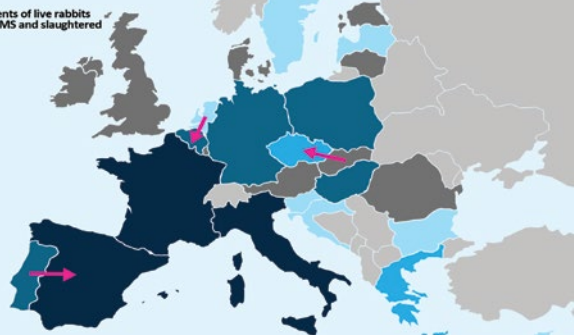




European
Commission



→ main movements of live rabbits
reared in one MS and slaughtered
in another



DG Health and
Food Safety

OVERVIEW REPORT

Commercial Rabbit Farming in the European Union

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EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR HEALTH AND FOOD SAFETY

Health and food audits and analysis

DG(SANTE) 2017-6303

OVERVIEW REPORT OF THE
DIRECTORATE-GENERAL FOR HEALTH AND FOOD SAFETY
ON COMMERCIAL FARMING OF RABBITS IN THE EUROPEAN UNION

Executive Summary

The aim of this overview report is to provide a better understanding of commercial rabbit farming in the European Union, with a focus on welfare at the time of production, as covered by Council Directive 98/58/EC concerning the protection of animals kept for farming purposes. This report follows the European Parliament resolution on " Minimum standards for the protection of farmed rabbits" which called upon the European Commission to establish a roadmap towards minimum standards for the protection of farmed rabbits.

The actual size of commercial rabbit farming in the EU and consumption of rabbit meat is just over a third of previously available figures, and it is highly concentrated in a few Member States. Different to other livestock species, there is a high proportion of rabbit meat - 34% - sourced via backyard farms and direct sales.

The main producing countries (Spain, France and Italy) highlight the importance of rabbit farming in maintaining rural communities, supporting the local economy and providing jobs outside urban areas. However, after many years of downturn in the consumption of rabbit meat and the low prices of rabbit fur, the commercial rabbit sector is facing fundamental challenges which will shape its future and threaten its sustainability.

Market demand is the main driver influencing production systems. The main market for rabbit meat coincides with the areas of production (Southern Europe) and is characterised by consumers' focus on price. In these main areas, traditional cages are the norm for farming (85% of total EU production). Conventional cages limit the expression of natural animal behaviours and increases the potential of situations, such as overstocking and cages for replenishing reproductive female rabbits, where EU legislative requirements are not met. On the other hand, if appropriate biosecurity measures are implemented, they facilitate handling and disinfection, which contributes to better health.

A secondary and much smaller market in volume (Central Europe) covers consumers with greater focus on the expression of rabbit behaviour. For this market, farming is moving towards enriched pen housing systems (6% of EU production). Whilst it provides for better opportunities for rabbits to express natural and social behaviours, it presents downsides regarding handling and disinfection and as a result, higher mortality and morbidity rates. Rabbit meat produced in this system is labelled differently and is more expensive at retail level.

Throughout Europe, production systems with enriched cages (9%), partially address shortcomings on animal welfare presented by conventional cages whilst maintaining biosecurity strength.

The two different markets would need to develop different strategies to find the best compromise for meeting their current demands regarding welfare of rabbits, farmers' needs and consumers' requests without compromising the sustainability of the sector.

Based on available results of official controls performed by competent authorities, the sector appears to be broadly in compliance with welfare legislative requirements.

Table of Contents

1. Introduction.....	1
2. Objective and scope	1
3. Background and Methodology.....	2
4. Assessment and procurement of data for analysis	2
5. Statistical data on rabbit farming and processing in the EU	3
6. Features of rabbit meat consumption	4
7. Trade of rabbit meat.....	5
8. Rabbit farming in the European Union	7
9. Rabbit welfare in commercial production systems	8
10. Rabbit welfare rules at the time of production.....	11
11. Conclusions.....	13
ANNEX I.....	15
ANNEX II	16

1. INTRODUCTION

This report follows the European Parliament resolution on "Minimum standards for the protection of farmed rabbits" which called upon the European Commission to establish a roadmap towards minimum standards for the protection of farmed rabbits. This report provides an overview of data gathered by the Commission services on rabbit farming in the European Union (EU), with a focus on welfare at the time of production, as covered by Council Directive 98/58/EC concerning the protection of animals kept for farming purposes.

The report is divided into eleven chapters which can be grouped into three main areas. The first area analyses data on production, processing, consumption and trade of rabbit meat. The second presents rabbit farming in the EU with a focus on the different commercial production systems and their effect on rabbit welfare. The third covers EU and national legislations at the time of production, together with official controls performed by the competent authorities.

Rabbit is, after poultry, the most efficient converter of proteins in cellulose-rich plants into food with high-value animal protein. With the current societal focus on sustainability and avoidance of competition between food and feed, rabbit meat production is thus especially interesting. Some countries such as France, Italy and Spain have a long historic tradition in the production and eating of these animals.

Consumption of rabbit meat has seen resurgences across Europe during wars as a way to cope with meat shortages. The fact that rabbits can be kept successfully in small areas and support household economy increased the popularity of rabbits as ‘backyard livestock’.

Eventually, rabbit keepers across Europe began to approach farming with the same scientific principles as had already been applied in the production of other species which led to the development of commercial rabbit farming. In many parts of the Union, rabbit production remained a small scale but consistent household and farm endeavour and in many cases was unregulated by the rules that governed the production of larger livestock.

As happened with other farmed species, public concern with rabbit farming practices grew in Europe. At the same time, globalisation increased the visibility of rabbit production and rabbit meat consumption in geographical areas where people had not previously been aware of them. This, together with the increase in popularity of the rabbit as a pet animal has resulted in a myriad of public campaigns in specific EU Member States over the last ten years directed at public administrations on the welfare of rabbits.

2. OBJECTIVE AND SCOPE

The aim of this overview report is to provide a better understanding of the commercial rabbit farming sector in the EU, its situation, economics, structure and current farming practices, with a focus on rabbit welfare during farming.

The scope of this overview report principally covers commercial farming of rabbits intended for meat production. It also includes available data on backyard farming. The farming of rabbits

intended principally for fur production has proven to be minimal in the EU and has therefore been excluded from the scope.

3. BACKGROUND AND METHODOLOGY

Commission Directive 98/58/EC¹ concerns the protection of animals kept for farming purposes and it applies also to rabbits. There is no specific EU legislation laying down minimum requirements for the protection of farmed rabbits. Pushed by internal demands and pressure exerted by non-governmental organizations, a number of EU Member States have developed national legislation in this area.

In 2005, the European Food Safety Authority (EFSA) published a scientific opinion on the impact of housing and husbandry systems on the health and welfare of farmed domestic rabbits².

The Council of Europe, via its Standing Committee of the European Convention for the Protection of Animals Kept for Farming Purposes, started work on drafting a recommendation concerning the protection of domestic farmed rabbits. This drafting was however abandoned in 2009 in the 19th version after failing to reach an agreement.

More recently, the European Parliament issued a report on "Minimum Standards for the Protection of Farmed Rabbits", and in March 2017, it backed a non-legislative resolution³ calling upon the Commission to establish a roadmap on minimum standards for the protection of farmed rabbits through a number of initiatives such as drafting of guidelines on good practices, and in the longer term the consideration of specific EU legislation.

In this context, the Commission services started a project to support the production of this overview report (Annex I). Main elements consisted of a series of fact-finding missions to some of the main producing Member States and to those that are moving towards alternative production systems. Questionnaires to competent authorities, farming associations, and veterinary rabbit practitioners' associations were circulated and responses received, together with further meetings, discussions and exchange of information with Non-Governmental Organizations, feed producers, farming, breeding, rabbit processing and veterinary associations.

4. ASSESSMENT AND PROCUREMENT OF DATA FOR ANALYSIS

When preparing this report, the Commission services have noticed that data available in regards to rabbit farming is limited and often unreliable. Rabbit meat production is not covered under the European Meat Market Observatory, thus the limited amount of information readily available was further undermined by the weak and unreliable source of primary data.

For the development of this overview report, a major effort has been made to gather primary data

¹ Council Directive 98/58/EC of 20 July 1998 concerning the protection of animals kept for farming purposes (OJ L 221, 8.8.1998, p.23).

² EFSA report *"The impact of the current housing and husbandry systems on the health and welfare of farmed domestic rabbits. Annex to the EFSA journal (2005) 267, 1-31.*

³ European Parliament resolution of 14 March 2017 on minimum standards for the protection of farm rabbits (2016/2077(INI)), P8_TA(2017)0077.

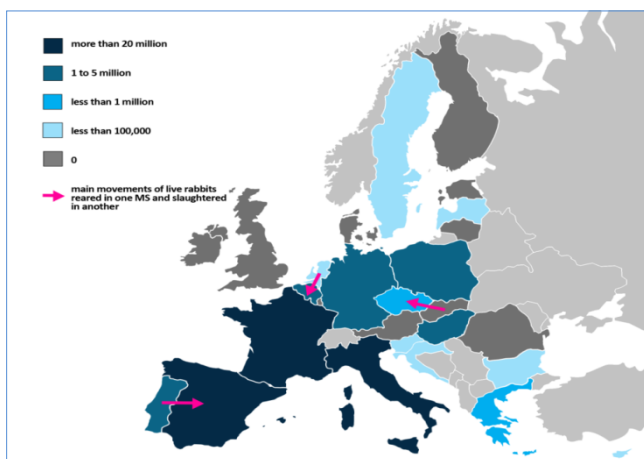
directly from competent authorities, based on information which is being accurately gathered (e.g. slaughter of livestock at approved slaughterhouses). Where doubts arose, data was further verified and validated against the information and knowledge requested and attained from national veterinary rabbit practitioners associations, EU rabbit breeders association, and rabbit farming associations.

5. STATISTICAL DATA ON RABBIT FARMING AND PROCESSING IN THE EU

There are around 180 million farmed rabbits reared for meat consumption in the EU. Around 119 million⁴ (66%) are kept in commercial farms and slaughtered for human consumption in approved slaughterhouses⁵. The other 61 million⁶ (34%) are reared, sold and consumed via back-yard farms, direct and local sales. These figures differ significantly from those used in previous publications, such as the EFSA opinion of 2005 and the European Parliament report of 2017⁷.

These figures indicate that in the EU, rabbits are in the sixth position regarding the numbers of farmed animals killed for human consumption (after poultry, laying hens, trout, salmon, and pigs) and eighth in terms of volume of meat with 168,000 tonnes, (after ovine meat but before caprine meat).

Rabbit farming is highly concentrated in three countries representing 83% of total EU production. Spain is the main producer with 48.5 million rabbits slaughtered in 2016, followed by France with 29 million and Italy, with an estimate of 24.5 million. There is a second group of 5 Member States with low production levels which together produce 14%, with another 10 Member States accounting for the remaining 3%. There are 10 Member States with no commercial slaughtering and farming of rabbits in their countries.



Map 1:

Number of rabbits slaughtered in 2016 at approved rabbit slaughterhouses in EU Member States (ANNEX II).

For some countries, the number of rabbits reared and the number slaughtered in their territory do not match. This is explained by the existing intra-EU trade of live rabbits between certain Member

⁴ MS official response to questionnaire "Commercial production of farmed rabbits in the EU" circulated on 12/04/2017. Validation exercises performed for data verification.

⁵ All data for 2016 - except for Greece (2013), Czech Republic and Sweden (2015). Ireland and Luxembourg did not provide information and the Commission did an estimation for these two countries.

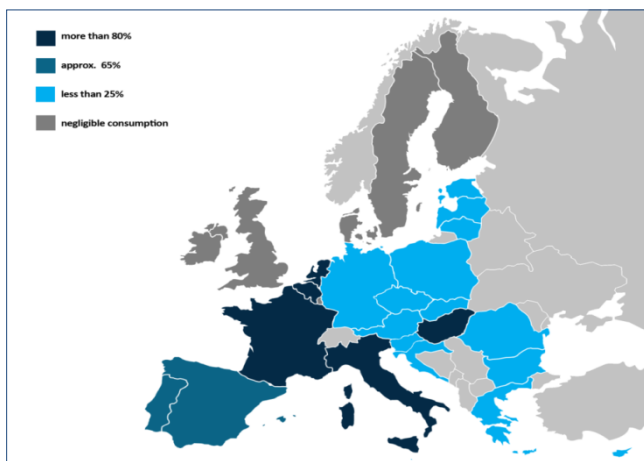
⁶ Based on information provided by competent authorities on estimations of own consumption and direct sales of rabbit meat in their Member States.

⁷ The EFSA opinion indicated 375 million of rabbits in the EU for year 2004 and the EU Parliament report indicated 340 million for year 2015.

States. The Netherlands sends the vast majority of their rabbits for slaughtering in Belgium, and to a lesser extent in Germany; the Slovak Republic sends its production to the Czech Republic, whilst Spain receives live animals from Portugal.

6. FEATURES OF RABBIT MEAT CONSUMPTION

Compared to other livestock species, there is a significant volume (34%) of the rabbit meat consumed in the EU which is sourced from backyard farms, direct and local sales (e.g. farmers markets)⁸ as opposed to more conventional retailing channels. Data from Member States suggest there are around 161,000 rabbit back-yard farms in the EU. A cultural link to sourcing rabbit meat to celebrate certain festivities persists in northern and central Europe, and also persists as a source of protein that is fairly simple to produce in rural communities and Member States which are economically less developed. In 16 EU countries, this is the main channel for the rabbit meat that is consumed.



Map 2: Percentage of total rabbit meat consumed in EU Member States that is sourced from commercial farms (ANNEX II).

Hungary and The Netherlands have an export-orientated rabbit farming industry with a very low level of national consumption.

There has been a continuous decline in the consumption of rabbit meat in the EU. This reduction in consumption is mainly linked to changes in consumer habits towards convenience foods, consumers losing the habit of eating rabbit meat, the increased perception of the rabbit as a pet animal, consumer price expectations and price competition at retail level versus other meats. Overall, rabbit meat consumption in the EU stands at 0.5 kg per person per year, of which 0.34 kg is sourced commercially.

⁸ Regulation (EC) 853/2004, allows certain derogations - such as the slaughtering of small quantities of farmed rabbits at registered farms, to be sold directly to final consumers, or to local retail establishments.

Member State	Kilograms of rabbit meat/person/year
Malta	> 3 kg
Spain, Portugal	1 kg to 1.5 kg
France, Italy	0.5 kg to 1 kg
Belgium, Germany	0.1 kg to 0.5 kg
Rest of EU Member States	< 0.1 kg

Table 1: Per capita annual consumption of rabbit meat in the EU sourced commercially.

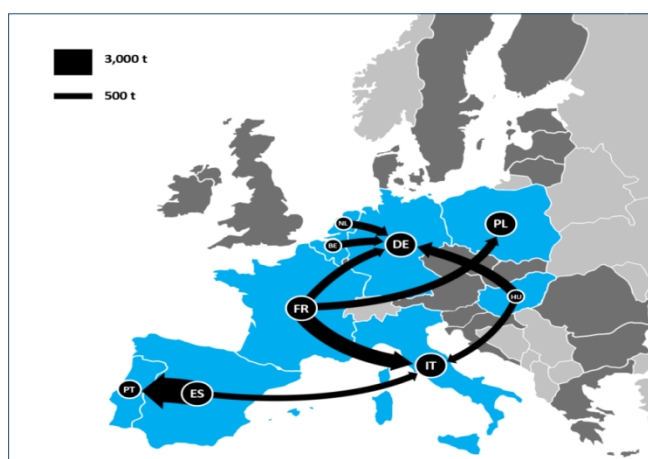
In Spain and Portugal, rabbit meat prices are in direct competition with those of poultry meat (5 Euro/kg of rabbit meat vs 10 Euro/kg in Belgium and 11 Euro/kg in Germany).

As a result of these factors over the last 10 years, there has been a decline in rabbit meat production in the EU of around 19% which is consistent across all the main producing countries. Belgium and Netherlands (accounting for 2.5% of total EU production) are an exception as they have been able to maintain their production levels as they accommodate their production systems to cater for welfare conscious consumer groups at home and abroad.

Against this negative trend, there is a consumer perception of rabbit production being sustainable and providing a healthy meat, which is supporting, albeit from a very low base, the uptake of consumption in certain consumer groups and Member States.

7. TRADE OF RABBIT MEAT

Of the total of 168,000 tonnes commercially produced in 2016 in the EU, 23,000 tonnes⁹ were traded within EU Member States, equating to 14% of total production.



Map 4: Main net trade flows of rabbit meat within the EU, 2016.

There are significant variations between and within Member States on final carcass weights. Whilst the average stands at 1.42 kg per carcass, countries like Spain, Portugal and Southern Italy lean towards younger rabbits with 1.2 kg carcass weight, whilst Germany, and other central European

⁹ DG TRADE Comext data sourced via .European Commission export helpdesk.

countries have a market for older rabbits of 1.6 kg carcass weight. This, together with price, and method of production, partly explains intra-EU trade flows and how specific exporting EU countries are able to accommodate their production to the market needs of importing countries.

China is the largest producer of rabbit meat in the world and the main exporter of rabbit meat into the EU accounting for 99% of total imports¹⁰. In 2016, imports accounted for less than 3% of available rabbit meat. The market consists of frozen carcasses that are mostly imported via Belgium, Germany, Czech Republic and France destined mainly for the food service industry.

Over the last three years there has been a decrease of over 45% in the amount of rabbit meat imported from China into the EU. The main reasons for this drop seem to be linked to an unfavourable currency exchange rate (Euro- Renminbi) and a significant increase in internal demand in China for higher value fresh rabbit carcasses¹¹.

It is worth noting that, different to the EU rabbit farming sector, the Chinese export rabbit industry tends to be fully integrated with the slaughterhouse, further processing establishments and farms under the same ownership and management.

	Year	Euro value in millions	Tonnes
Imports of rabbit meat from China into the EU	2014	24,432	7,498
	2015	19,841	6,167
	2016	16,542	4,799
Exports of rabbit meat from the EU into to non-EU countries	2016	13,967	3,769

Table 2: Imports of rabbit meat from China into the EU from 2014 to 2017 and exports from the EU in 2016¹².

The EU also has a sizeable exporting market, which is split in neighbouring non-EU countries demanding higher value fresh rabbit meat (e.g. Switzerland), and a market for lower value offal (e.g. China, including Hong Kong).

Europe holds a relatively narrow negative trade balance on rabbit meat. Nevertheless, it should be noted that the Chinese market is not open to EU rabbit meat exports intended for human consumption, and thus this limits the capability to expand EU exports to this market which has growing demand, which is important in the current environment of shrinking internal markets and surplus EU production.

¹⁰ Import of "hare meat" into the EU also takes place, but from Argentina, Uruguay and to a lower extent Chile. It accounted for 1,215 tonnes in 2016.

¹¹ Information gathered at mission DG(SANTE)/2017-6230 "Report of an audit carried out in China from 05/06/2017 to 16/06/2017 in order to evaluate controls for food of animal origin in particular poultry meat, egg products and rabbit meat for export to the European Union.

¹² Data from EU Commission Trade website "export helpdesk".

¹³ Commercial rabbit farms are defined as those that send rabbits to slaughter at approved abattoirs.

8. RABBIT FARMING IN THE EUROPEAN UNION

The number of commercial farms in the EU¹³ is estimated at around 4,500. As expected, they are mostly present in Spain, France and Italy. On the other side of the spectrum there are eight countries with no commercial farms, and a further eight with less than ten in their territory.

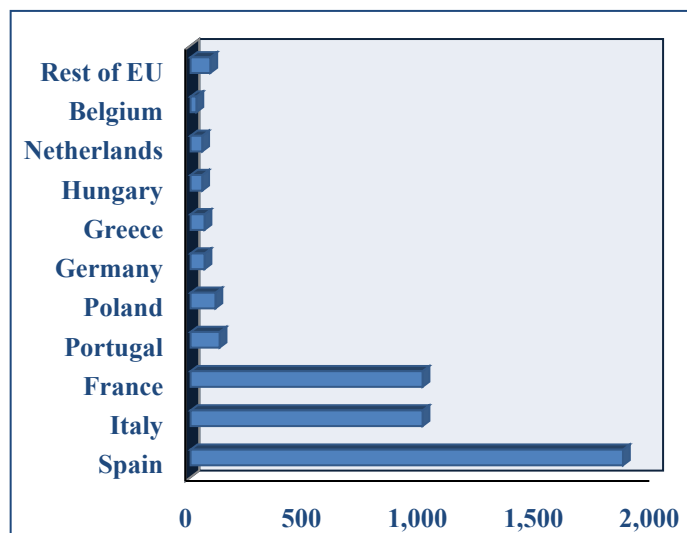


Figure 1: Number of commercial rabbit farms in EU Member States.

In the past ten years, there has been a reduction in the number of commercial farms, which was steeper than the actual reduction in production level. The number of farms decreased by 20% in Hungary in the last 5 years and by 40% in Spain and Italy in the last ten years. In Belgium and The Netherlands there was a reduction of 70% in the number of farms in the past 20 years.

This trend, which is set to continue, is the result of a move towards greater professionalization in rabbit farming - following the same steps as other livestock species - as margins and operating profits narrow. Farms are becoming bigger in size, more specialised, farmers are better prepared and facilities are improving. Many small and medium size farms, affected by the crises, have been unable to make the necessary upgrades and investment, and are thus moving out of the business.

To become a self-sufficient business and enable full-time employment of the farmer, a farm needs at least 700-800 does (reproductive female rabbits). Thus, new and newly refurbished rabbit farms generally have over 1,000 does and in some cases over 2,000 does.

In the majority of Member States, most farms are independently owned family businesses, with some level of vertical integration in Spain and Italy (i.e. farmers working under contract with integrated rabbit production and processing companies). In the main producing countries, independent farmers tend to organize themselves via cooperatives; in Spain and Italy these are less formalised as opposed to France which has very strong farmers' cooperatives in charge of the technical management, commercialization and liaison with processors.

Despite its decline, the importance of the commercial rabbit sector in maintaining jobs and people in rural areas, and providing jobs should not be underestimated. In Spain alone the sector accounts for 6,000 direct jobs with a further 12,000 indirect jobs estimated.

Currently, the rabbit sector is in a weak financial situation that can be linked to oversupply - due to shrinking demand - and the need to face other challenges, also affecting other livestock sectors to different degrees, such as the reduction in the use of anti-microbial substances, compliance with environmental legislation on emission reductions, and improvements in animal health via enhanced biosecurity. Each one of these will, in principle, result in extra financial costs, either up-front or in operational costs.

For the sector, income comes mainly from meat, but also from selling rabbit skins and, to a lesser extent, other by-products (e.g. dried brains for medical devices). These extra sources of revenue have in the past cushioned any reductions in rabbit meat prices; however the rabbit skin trade collapsed towards the end of 2014 and current market prices stand at around 15% of previous ones.

Commercial production is quite standardised. For fattening rabbits:

- The production cycle lasts 63-66 days (Spain), 70-73 days (France) and up to 80 days (Germany).
- Rabbits are usually un-weaned at around 32 days.
- Artificial insemination is the norm, and does are artificially inseminated 10 days after giving birth and have around 8.5 pregnancy cycles in a year. They are expected to provide 7-8 viable fattening rabbits per cycle to reach the slaughterhouse.
- The average productive span of a doe is seven productive cycles (11 months).

Due to the sensitivity of rabbits to diseases, farm facilities that permit improved biosecurity measures such as "all-in all-out" systems are the preferred option by farmers. Its implementation results in reduced mortalities and morbidities, and permits further reduction in the use of anti-microbial substances. The use of anti-microbials¹⁴ presents major variations between Member States, with The Netherlands having reached 70% reductions, over 35% reduction in France and some parts of Italy over the last 5 years, whilst Spain on the other hand, is just starting with the implementation of its strategy on the reduction in the use of anti-microbials and there is still an important tendency to use them prophylactically.

9. RABBIT WELFARE IN COMMERCIAL PRODUCTION SYSTEMS

Commercial production systems in the EU could be classified into three main types: Conventional production system (barren cages) accounting for around 85% of total EU production, enriched cages accounting for 9% and the pen "Park" housing system accounting for the remaining 6%. Other production systems do exist in the EU, but they are either residual in number (e.g. organic farming) or used in non-commercial environments, thus not permitting a direct comparative.

Rabbit farming production systems in Member States are strongly influenced by the market destination of their products. For example The Netherlands and Hungary use the pen housing system in 60% and 40% of their fatteners respectively, in spite of this not being a legal requirement in their country, as a way to access external markets that demand higher animal welfare during production (e.g. Belgium, Germany and Switzerland). Italy and France are starting to increase from the current level of around 3-4% in the pen housing system to cater for similar national and foreign demands.

¹⁴ Further detailed information can be found in DG (SANTE): Overview Report AMR Prudent Use of Antimicrobials (2016-6238).

Spain, whose production supplies mainly internal and price conscious markets, does not show signs of moving from traditional cages.

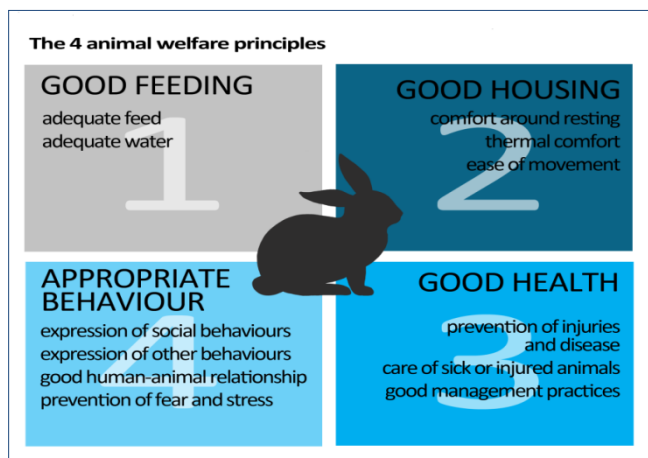


Table-3: The four animal welfare principles used as assessment tool for on-farm welfare (EBENE project France).

Conventional production system

Production takes place in cages with sizes ranging from 38-40 cm in width, 90-100 cm in length and 32-40 cm in height. The same types of cages are used for fattening rabbits, for pregnant does, and for does with kits. Maximum stocking densities showed variations between Member States, from 45 kg/m² to close to 50 kg/m² depending on how old animals were when sent to slaughter.

A second type of even smaller cage exists for replenishing stock/non-pregnant does ranging from 25-40 cm in width, 45-51 cm in length and 29-40 cm height. Foot-rests are widely used to avoid injuries from continually sitting on a wire cage floor. Fattening rabbits tend to be kept together in groups since birth in the same cage (doe removed after weaning) to allow for minimum handling and mixing.

The conventional production system can provide for acceptable levels of feeding, health and housing. The limited space availability due to cage sizes and stocking densities, limits normal rabbit behaviours such as gnawing, hopping and standing. This situation is further exacerbated in the smaller cages used for non-pregnant does as they even face difficulties in standing up or turning around.



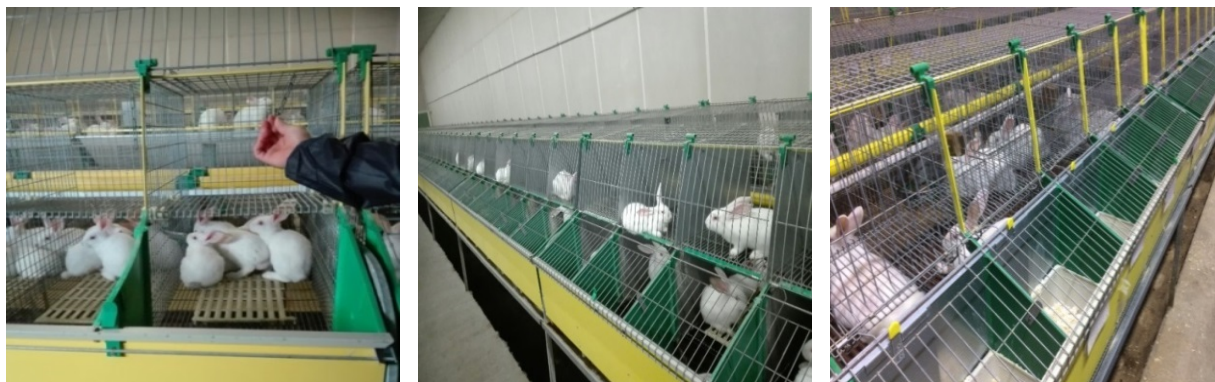
Photos 1-3: Standard type of production.

Enriched cages

Cage sizes range from 38-40 cm in width, 100 cm in length and 60 cm in height. Effectively, they are modified standard cages where the roof has been raised and a platform has been added at a height of around 32 cm. Other enriching materials such as gnawing wooden sticks or chains have also been added. The stocking densities used, 40 kg/m², are lower than those in the conventional production system. The same cages are used for fattening rabbits, for pregnant does, and for does with kits. In the majority of Member States, cages to raise replacement does are the standard smaller cages previously described.

This production system, compared with the conventional system, maintains and even improves the health status of the farm - thus providing the added benefit of a reduction in the use of anti-microbial substances. At the same time, it partially addresses the issues arising from limited space and barren environment, as rabbits can express an extended range of natural behaviours.

Due to differences in cage heights, farmers reported problems with handling and ergonomics, with a risk of injury from repetitive strain, as their facilities were originally designed for the standard cage.



Photos 4-6: Production in enriched cages¹⁵.

Pen "Park" housing system

The pen housing system uses cages ranging between 180-200 cm in length, 100 cm wide and with no height restrictions. The system includes platforms, 45 cm wide, and enrichment materials such as gnawing wooden sticks, and tubes for hiding. Maximum stocking densities of 30 kg/m² are used.

Currently, the pen housing system is almost only used for fattening rabbits due to aggressive protective behaviours expressed by does with kits. A handful of commercial farms are starting to try and apply partial pen housing during the last ten days before weaning takes place. It is for this reason that the majority of does are still kept in standard or enriched cages.

This housing system, as reported by farmers themselves, provide for the best environment for rabbits to express their natural behaviour. Rabbits are livelier and avail of the extra space provided, to hop, stand up, and move around, hide under the platform or inside plastic tubes, and gnaw at the different materials provided.

¹⁵ Picture number 6 courtesy of Netherlands Food and Consumer Product Safety Authority.

A major drawback is the lack of a possibility to implement "all-in all-out" measures, as rearing spaces for does and fatteners are different. This results in higher levels of mortality and morbidity - which reduces the welfare of the animals - and in other welfare issues linked to the mixing of litters, e.g. increased fighting when animals start reaching maturity. It also implies an increased level of handling and management by the farmer.

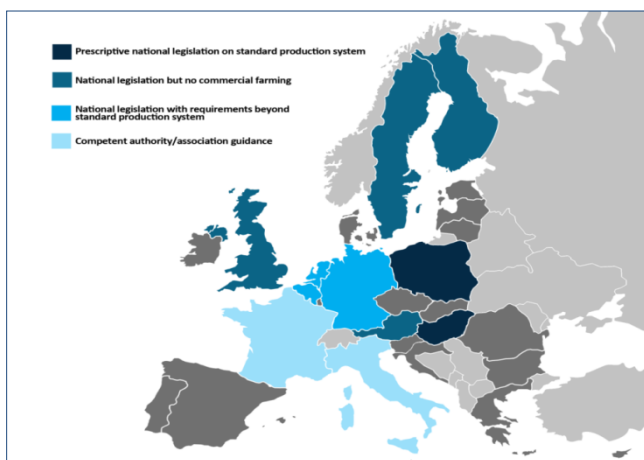


Photos -7-9: Production in pen housing system¹⁶

10. RABBIT WELFARE RULES AT THE TIME OF PRODUCTION

There is EU legislation (Commission Directive 98/58/EC) concerning the protection of animals kept for farming proposes that applies to rabbits bred or kept for farming. This Directive requires EU countries to make provisions to ensure that keepers of animals take all reasonable steps to ensure the welfare of animals under their care and to ensure that these animals are not caused any unnecessary pain, suffering or injury. Moreover, the Directive requires Member States to ensure that conditions under which animals are bred or kept, having regard inter alia to the ethological and physiological needs of the animals, comply with certain requirements, for example regarding the freedom of movement of an animal or concerning buildings and accommodation in which it is kept.

There are no additional specific welfare conditions for the production of rabbits at European level.



MAP 3: Member States with national legislation or statutory guidance covering the welfare of farmed rabbits.

¹⁶ Pictures courtesy of Dutch rabbit farming association and Netherlands Food and Consumer Product Safety Authority.

A number of EU Member States have developed more prescriptive national legislations covering the protection of farmed rabbits during production. Some of them, like United Kingdom, Sweden, Finland, and Austria do not have commercial farms in their territory. This makes it impossible to assess the impact and benefits of such national legislation in a commercial environment. Austria is an illustrative example, as its national legislation bans the use of cages and requires, among other things, the rearing on the floor and the availability of bedding material. However, the biggest farms in Austria have currently less than 50 does, with a focus on the local market.

Hungary, and to a very limited extent Poland, have developed national legislation prescribing minimum requirements for the standard type of production. These include maximum stocking densities and cage sizes. The prescribed standards are very similar to those found in other Member States with the same type of production system.

Belgium and Germany have developed national legislation aimed at moving all farms towards a pen housing system in a staged approach. They have started with fatteners and will continue with does with their kits, providing transitional periods to farmers to comply with the rules.

In the case of The Netherlands, their national legislation currently favours enriched cages. The Dutch authorities are now in the process of reviewing and re-drafting the rules with a view to a pen housing system being required.

The above national legislations were implemented within the last four to eight years, with transitional periods allowing time for conventional production systems to adhere to those standards. In Belgium and The Netherlands alone, the rabbit farming associations anticipate a reduction to around 45 commercial farms from the current 70 as the end of the transitional periods approach in the next few years.

In Italy, the competent authority produced guidance that has been circulated to rabbit farmers. It outlines good husbandry practices, farmers' expected level of competence, together with minimum cage sizes, space availability and the provision of enriching materials.

In France, the rabbit industry is currently drafting guidance. It is also in the last stage of rolling out an on-line assessment tool developed to measure on-farm welfare indicators with a focus on feeding, housing, health and expression of natural behaviours.

In Spain, at the time of this overview report, a good practice guidance had been developed by the central competent authority in cooperation with the rabbit farming associations. This guidance, primarily focuses on good husbandry practices and biosecurity measures to ensure good rabbit health, with however little attention given to the capability to express appropriate behaviour."

Regarding delivery of official controls to verify compliance with animal welfare legislation at rabbit farm level, the fact-finding missions showed that the Member States visited had specific or combined risk-based inspections at rabbit farms at a low frequency based on the results of their risk analysis.

Five of the eleven main producing countries have an overview at a central level on the results of the inspections. Those Member States totalled 854 inspections in 2016 (of which 88% took place in

Italy), where, in a total of 29 farms, non-compliances (3%) were noted, with only one instance resulting in immediate action for administrative or criminal penalties.

In some Member States, competent authorities were relatively well aware of farms with deficiencies. Based on own experience and knowledge of the sector, they had decided against formal enforcement action to allow for the natural path of those farms towards closure in the short or medium term, as they were no longer profitable businesses.

France monitors animal health and welfare indicators at the slaughterhouse. On-farm mortality after weaning, post-mortem findings (including bruises and fractures) and mortality during transport were monitored and recorded with investigations taking place when reaching pre-set trigger limits.

11. CONCLUSIONS

The actual size of commercial rabbit farming in the EU and consumption of rabbit meat is just over a third of previously available figures, and it is highly concentrated in a few Member States. Different to other livestock species, there is a very high proportion of rabbit meat -34% - sourced via backyard farms and direct sales.

The main producing countries (Spain, France and Italy) highlight the importance of rabbit farming in maintaining rural communities, supporting the local economy and providing jobs outside urban areas. However, after many years of downturn in the consumption of rabbit meat and the low prices of rabbit fur, the commercial rabbit sector is facing fundamental challenges which will shape its future and threaten its sustainability.

Market demand is the main driver influencing production systems. The main market for rabbit meat coincides with the areas of production (Southern Europe) and is characterised by consumers' focus on price. In these main areas, traditional cages are the norm for farming (85% of total EU production). Conventional cages limit the expression of natural animal behaviours and increases the potential of situations, such as overstocking and cages for replenishing does, where EU legislative requirements are not met. On the other hand, if appropriate biosecurity measures are implemented, they facilitate handling and disinfection, which contributes to better health.

A secondary and much smaller market in volume (Central Europe) covers consumers with greater focus on the expression of rabbit behaviour. For this market, farming is moving towards enriched pen housing systems (6% of EU production). Whilst it provides for better opportunities for rabbits to express natural and social behaviours, it presents downsides regarding handling and disinfection and as a result, higher mortality rates and disease morbidities. Rabbit meat produced in this system is labelled differently and is more expensive at retail level.

Throughout Europe, production systems with enriched cages (9%) partially address shortcomings on animal welfare presented by conventional cages whilst maintaining their biosecurity strength.

The two different markets would need to develop different strategies to find the best compromise for meeting their current demands regarding welfare of rabbits, farmers' needs and consumers' requests without compromising the sustainability of the sector.

Based on available results of official controls performed by competent authorities, the sector appears to be broadly in compliance with welfare legislative requirements.

ANNEX I

"Commercial production of farmed rabbits in the European Union" Project performed from April to October 2017.

Main project components that have enabled the gathering and analysis of the necessary information to draft this overview report.

1. Member States official response to questionnaire "Commercial production of farmed rabbits in the EU" circulated on 12 April 2017. Data verification and validation checks performed.
2. Rabbit Farming Associations in relevant EU Member States response to questionnaire "Commercial production of farmed rabbits in the EU, farming association perspective" circulated 29 May 2017.
3. Fact-finding missions performed in four EU Member States:
 - a) Spain : June 2017
 - b) France: July 2017
 - c) Belgium: September 2017
 - d) Netherlands: September 2017
4. Questionnaire sent by the Federation of Veterinarians of Europe (FVE) to the relevant rabbit veterinary practitioner's branches on behalf of DG (SANTÉ) Health Audit and Analysis circulated July 2017.
5. Meeting with relevant Non-Governmental Associations active in the subject of rabbit farming. September 2017.

ANNEX II

Number of rabbits slaughtered in 2016 at approved rabbit slaughterhouses and sourced from backyard farms, direct and local sales per EU Member State.

EU MEMBER STATE	AT APPROVED SLAUGHTERHOUSES ¹⁷	AT BACKYARD FARMS, DIRECT AND LOCAL SALES ¹⁸
SPAIN	48,500,000	16,000,000
FRANCE	29,000,000	6,000,000
ITALY	24,500,000	4,500,000
HUNGARY	4,350,000	200,000
PORTUGAL	4,295,940	4,000,000
GERMANY	3,400,000	15,000,000
BELGIUM	2,876,572	300,000
POLAND	1,010,000	3,000,000
CZECH REPUBLIC	655,838	2,000,000
GREECE	336,801	3,000,000
MALTA	50,000	500,000
LATVIA	30,000	500,000
THE NETHERLANDS	25,000	100,000
SWEDEN	12,500	400,000
ESLOVENIA	10,000	300,000
CYPRUS	9,702	300,000
BULGARIA	8,556	500,000
CROATIA	4,177	200,000
LITHUANIA	0	500,000
DENMARK	0	100,000
SLOVAK REPUBLIC	0	1,000,000
ROMANIA	0	1,000,000
UNITED KINGDOM	0	100,000
IRELAND	0	100,000
LUXEMBOURG	0	0
ESTONIA	0	200,000
FINLAND	0	200,000
AUSTRIA	0	1,000,000
TOTAL EU	119,075,086	61,000,000

¹⁷ Data as provided by competent authorities of EU Member States, no responses received from Ireland and Luxembourg, so their figures calculated on available intelligence. Calculated margin of error of available commercial data \pm 5%.

¹⁸ Quantities based on percentages over total consumption provided by Competent Authorities of EU Member States, in some instances amendments have been made based after verifications of data and further information attained. For some Member States no data was provided and quantities have been calculated based on information from neighbouring countries and data available on rabbit meat consumption habits.

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