EUROGROUP FOR ANIMALS

REPORT

FROM STABLE TO FORK

EU HORSE MEAT IMPORTS

EUROGROUP FOR ANIMALS

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1 INTRODUCTION

Just under 66.1 million horses are recorded as livestock worldwide, with 6.3 million being slaughtered every year. Equine welfare and the traceability and identification of horses has been a topic of heated discussions in the last few years. In 2013, the European Union was shaken by its own horse meat scandal, when supposed beef products sold at retailers turned out to contain horse meat. It led many consumers to question the content of their food. Longer supply chains and more operators are involved in the equine meat industry compared to other categories of meat, which increases risks for consumers and animals.

This is of particular importance in relation to horse meat from non-EU countries. The EU imports horse meat from third countries where minimum welfare standards for the slaughtered animals are not met. Undercover investigations by Eurogroup for Animals' members Tierschutzbund Zürich (TSB), the Animal Welfare Foundation (AWF), GAIA, but also Animals' Angels USA (Investigations & Advocacy) have uncovered appalling conditions and cruelty to horses during transport, at auctions and assembly centres/ holding facilities, and at slaughterhouses. Audits by the European Commission[1] have similarly identified problems concerning animal welfare at the time of slaughter and during transport (although no EU transport requirements are in place).

One particularly grim source of horses entering the horse meat chain are so called blood collection centres, mostly located in Argentina and Uruguay. Blood collection centres (also called blood farms) are facilities where the hormone eCG (equine chorionic gonadotropin, also called pregnant mare's serum gonadotropin or PMSG) is extracted from the blood of pregnant mares. The fertility hormone is used to regulate the breeding of farm animals in Europe, notably pigs. The blood collection centres are far from respecting welfare standards. Exhausted mares, that have survived the ordeal at the blood farms, end up at slaughterhouses producing horse meat for human consumption.

Furthermore, the NGO investigations and EU audits have identified severe deficiencies in the reliability of identification and traceability of the horses' origin. The horses are not raised and kept for human consumption, but are, for example, riding, racing or rodeo horses no longer fit for purpose. These animals are likely to have been treated with veterinary medicines, drugs and other substances deemed unsafe for human consumption. The lack of traceability thus poses a food safety concern. Nevertheless, at EU level there is little intention to introduce mandatory country of origin labelling for horse meat.

[1] Audit reports can be accessed at the Commission's website.

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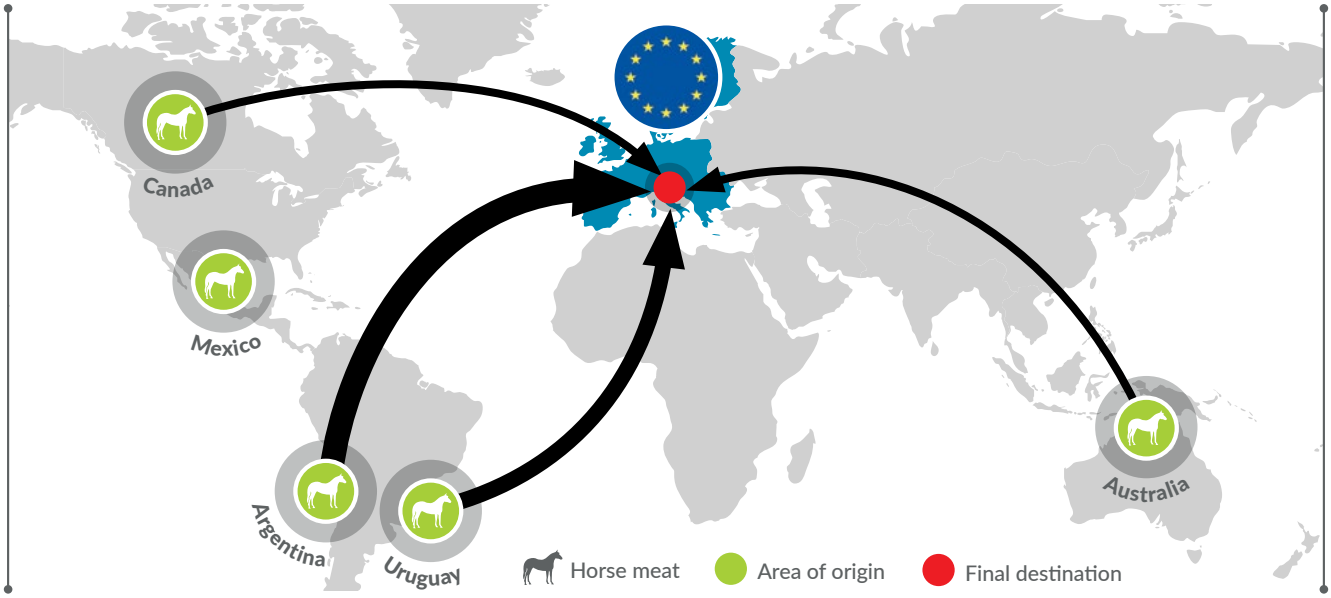
HORSEMEAT PRODUCTION AND EU CONSUMPTION



Based on FAO data from 2017, the current global herd size of horses is 66.1 million. The US, Mexico, China, Brazil, Mongolia and Argentina are – in this order – the countries with the largest stock size. In Europe, the Member States keeping the most horses for agricultural purposes are Germany, the UK, Italy, France and Spain. Of the 6.3 million horses that are slaughtered every year,[2] the countries with the highest number of killed individuals include China, Kazakhstan, Mexico, Mongolia, Russia and Brazil (however, Australia, Kyrgyzstan and Argentina rank higher in terms of produced tonnes of horse meat than Brazil). As for Europe, the highest-ranking countries include Spain, Romania, Italy, Poland and the UK.

EU consumption and total EU trade in horse meat have declined overall between 2000 and 2015. A European Commission audit report from 2013 on horse meat in the EU indeed spoke of a *'fall in popularity of horse meat for the EU consumer'*. Declines before 2013 were mostly due to a fall in horse meat production in Italy, while post-2013 decreases could be attributed to the EU horse meat scandal. Since 2015, however, at least intra-EU trade in horse meat seems to be increasing.

The EU's horse meat scandal began towards the end of 2012, when Irish authorities detected horse DNA in meat and meat products labelled as beef. In January 2013, they reported their findings, leading the UK to ask its industry to test all its beef products for horse DNA. Subsequently, products were taken off the shelves in Germany, Sweden, Belgium, the Netherlands, Ireland, the UK and Switzerland. In March 2013, the Commission announced a 5-point action plan to address the scandal and the EU Food Fraud Network was created in July the same year.

Alongside these events, TSB and AWF released findings from their investigations into North and South American horse slaughterhouses, revealing appalling conditions and malpractice, as well as fraudulent activities in relation to identification of horses. On top of that, Argentinian media reported that stolen horses were found at the slaughter plant Lamar, which was also part of the animal protection organisations' investigations. Lamar is an EU-approved slaughterhouse that exports to the EU.

[2] It is not possible to determine the purpose of the killing (i.e. for human consumption or not) from the FAO data. A proportion of the horse meat may be used in the pet food market and/or to feed captive wild animals in zoos.

Responding to public concern, the European Commission started a series of audits related to horse meat in the countries authorised for export to the EU.[3] The authorised countries included Argentina, Australia, Canada, Mexico, Brazil, Switzerland[4] and Uruguay. Brazil and Mexico used to be important sources. However, animal welfare and traceability issues have led to suspensions of imports from these two countries. The US is another, although indirect, source of horse meat. The US stopped producing horse meat in 2007, but horse meat from US animals continues to be sold in Europe as they are shipped for slaughter to Mexico (only pet food production) and Canada. Each country's case will be briefly elaborated on, including audit reports and events as of 2007.

ARGENTINA

Argentina is currently the biggest supplier of horse meat to the EU. Since 2007, 9 EU audits took place and the country's slaughter plants and their suppliers have also been under investigation by animal protection organisations. European institutions have been long aware of issues with identification and traceability of horses. Already in 2007, an audit in Argentina made a recommendation *'to develop and implement clear, realistic and appropriate procedures for horses' holding registration, identification and movement controls'*, as EU requirements were not met.

In response, Argentina launched a pilot project in January 2008 on identification and traceability. A February 2008 audit's preliminary assessment judged the project as adequate. Another audit in June the same year on residues, however, criticised the absence of veterinary treatment records at farms. Another 4 audits between 2010 and 2012 were overall favourable, although they identified deficiencies in relation to traceability and criticised the lack of verification of owners' statements concerning medical treatments, as well as inefficient review of the EU-approved establishments list. No immediate risks were recorded for human or animal health.

In 2010, GAIA conducted the first NGO investigation in Argentina, which revealed blatant abuses. In 2013, TSB and AWF published another investigation into the transport conditions and malpractices at the EU-approved Argentinian slaughterhouse Lamar, which coincided with the Argentinian media scandal concerning the discovery of stolen horses at the same plant and the EU horse meat scandal. The European Commission scheduled another audit in 2014 that was satisfactory overall but mentioned detected deficiencies on animal welfare, identification with ear tags, traceability and the vendors' declarations on veterinary treatments.

Despite recommendations by the audit team and guarantees from Argentina to improve conditions, TSB and AWF revealed in other investigations in 2015, 2016 and 2017 that nothing had changed. The next EU audit in 2018 again concluded as favourable overall despite deficiencies, on the basis that new legal provisions on traceability would come into force in Argentina in March 2019. The report also highlighted animal welfare concerns:

'The occurrence of deaths of horses in acopios [horse assembly centres] over a substantial period of time without being recorded or detected implies that official services would not be aware of possible animal welfare or other issues, and not be in a position to intervene in a timely fashion, where necessary.'

Despite recurrent deficiencies related to identification, traceability and animal welfare of slaughtered horses, the European Commission has not acted in any significant way. In 2019, TSB and AWF released films and a report about new investigations in South America, yet again demonstrating the appalling conditions and maltreatment of the horses, as well as persisting issues with traceability. The investigations also clearly demonstrate the changes made at slaughter plants and related sites just before industry or Commission audits. Any improvements made, however, are only short-lived.

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[3] Whether a country is authorised to export horse (or any other type of) meat to the EU is dependent on three approval processes. Firstly, the country needs to be listed for equine meat in Regulation (EU) No. 206/2010. 30 countries are currently listed and thus in principle authorised for horse meat exports to the EU.
A country also has to submit a residue monitoring plan, ensuring the detection of illegally used and misused substances, and thus, ensuring food safety. 9 out of the 30 countries are listed in Decision 2011/163/EU for having an approved residue monitoring plan. The residue monitoring plan for each year and the monitoring results of the previous year's plan need to be submitted to the Commission yearly.
Lastly, individual establishments seeking to export horse meat to the EU need to be authorised and added to the list of approved establishments by the country's competent authority. The country's competent authority is expected to keep this list up to date and to carry out inspections regularly at these establishments, ensuring they meet the relevant EU requirements. The Commission has to approve any new listings and can also take steps to delist establishments. As concerns the 9 remaining countries, only 5 have listed establishments: Argentina, Australia, Canada, Switzerland and Uruguay.

[4] Switzerland is not further discussed here as it has equivalent animal welfare standards as the EU. Although it is possible that the country imports meat from non-EU countries and re-exports it to EU Member States, the country exports only sporadically and in small volumes.

BRAZIL

European Commission (DG SANTE) audits in Brazil have detected deficiencies in the traceability of the horses' origin and the residue status (concerning veterinary drugs and other substances) of equine meat in at least four audit reports since 2008. A report on a horse meat audit of September 2015 also mentions *'serious animal welfare problems prior to or during transport that the FBO [Food Business Operator] should have detected and taken measures to prevent'*. The audit team had observed dead and weak animals (which should have been deemed unfit for transport) arriving, as well as a lack of animal welfare assessment upon the animals' arrival, meaning that emergency killings were carried out too late. The report recommended to take appropriate actions *'in order to address high mortality rates'*.

The Brazilian competent authorities provided guarantees they had addressed the recommendations and deficiencies after each audit. However, in March 2017, a federal police investigation (operation 'Carne Fraca') was launched in Brazil, involving 21 major meat-producing companies. The companies had sold contaminated meat nationally and internationally, for example by changing expiration dates, using chemicals to change the meat's appearance and mask bad smells, or inject water into the meat to increase its weight. In addition, officials carrying out controls at these establishments were suspected of corruption.

In response to this scandal, the European Commission carried out another audit on meat in May 2017, and a follow-up in January/February 2018. The 2017 audit identified critical deficiencies, seriously questioning the overall credibility of official controls, guarantees provided on exported meat and meat products, as well as guarantees provided in response to previous audit recommendations. The Commission took steps for all involved facilities (including all horse meat slaughter plants) to be removed from the list of establishments eligible for exports to the EU, and requested that the Brazilian authorities stop submitting requests for the addition of new establishments. A regime of reinforced checks for Brazilian meat and meat products was also introduced. The follow-up audit did not look into horse meat production as establishments for horse meat were no longer listed nor had been requested to be listed.

AUSTRALIA

In 2007, Australia introduced a new system whereby horses must be accompanied by a horse vendor declaration (HVD), which has to include information on veterinary treatments during the last six months. An audit by the European Commission the same year identified this as *'a clear step forward in providing a basis for certification of horse meat to the EU'*. Weaknesses in traceability remained, however, as a 2008 audit report observed. The following three audits between 2009 and 2012 confirmed recurring deficiencies in horse identification.

In 2014, the Australian Department of Agriculture received a complaint that the horse meat would not meet EU requirements, as horses in a particular saleyard in Northern Victoria would sell horses without HVDs. The complaint was passed on to the European Commission, which carried out another audit in November 2015 on residues. The audit found weaknesses in owner statements on the treatment of horses with veterinary medicines. Although concerns were raised over the use of substances in horses that are not authorised to be used in food producing animals in the EU, the audit team also remarked that residue testing for these substances was part of the Australian residue monitoring plan.

Australia only has two horse slaughter plants (both approved for exports to the EU).5 In such a vast country, this means that horses are likely to have travelled long distances prior to slaughter. Journeys from Victoria to Queensland or South Australia can last several days. Transport is not well monitored nor regulated. Australian standards on land transport of horses allow for horses to be transported for up to 24 hours without water, and up to 36

Emaciated discarded racehorses at an assembly centre in Australia. © Animal Welfare Foundation

[5] The plant in South Australia no longer slaughters horses since mid 2019, although it is still approved to do so.

hours if water is provided (which is unusual and rare). Given the lack of enforcement, journeys might well be extended to 48 hours when horses remain on board of trucks without food and water, during a driver's required resting periods. In November 2019, an Australian NGO documented the journey of horses travelling from an assembly centre in Mooroopna, Victoria, to the Meramist plant in Caboolture, Queensland. The journey time reached around 30 hours. During that period, the horses were not unloaded for the mandatory 12-hour break during which they should be watered, fed and rested. Journeys in general are stressful to horses and research demonstrates that even 6 hours of travelling can cause a suppression of the immune system, indicating welfare problems. Herding and holding of the horses can also lead to aggression, fear and injuries.

Horses are generally not considered animals for food production in Australia. The two Australian horse slaughter plants produce meat primarily for the foreign market. When Western Australia granted a licence to one butcher to sell horse meat for domestic human consumption in July 2010, protests followed. The domestic market remains small, as this butcher apparently only slaughters 20 horses per year. In October 2019, the undercover footage of ex-racehorses being mistreated and cruelly killed at Meramist abattoir caused a huge public scandal.[6] The film "The Final Race", broadcast by ABC, shocked Australians. This scandal triggered an official Inquiry, which concluded that Australian animal welfare standards for both slaughter and transport of horses fall below OIE standards, and that many factors such as poor design of the slaughterhouse, inappropriate handling of horses or the use of electric prodders, lead to poor welfare outcomes and cannot be prevented under current legislation. The latest audit report published by the EU still criticises the traceability and food safety in this sector.

CANADA

As in all the countries discussed so far, identification, traceability and animal welfare issues also have a long-standing history in Canada. The European Commission has been well aware of these problems for several years. For example, a 2007 audit report concluded that *'the eligibility of the horses to be slaughtered for export to the EU is not verifiable due to the lack of a proper identification and registration for the animals and the farm or other place of origin ensuring the traceability of the animals'*. The audit team also noted that animal welfare controls, in particular in relation to proper killing of horses, did not meet EU requirements. Another audit in the same year on residues,

Feedlot run by the Bouvry Slaughterhouse, with no shelter - Alberta, Canada. © Animal Welfare Foundation

equally stated that there were no guarantees for the absence of certain (prohibited) substances due to the lack of medical records.

A 2010 audit report recorded changes in the Canadian system. Horses destined for slaughter now had to be accompanied by an affidavit signed by the last owner, documenting the horse's identity, medical treatment in the last six months and stating that no growth promoters were used. However, the audit report pointed out that those affidavits were not verifiable for horses coming from the US;[7] thus concerning the majority of slaughtered animals. The main concern about horses from US origin is the administration of substances that are strictly prohibited in the EU for use in food animals (such as phenylbutazone or anabolic steroids). The issue remained unresolved, as confirmed in a 2011 audit.

Following the horse meat scandal in the EU and Argentina, a report from a 2014 audit in Canada even spoke of *'serious concerns in relation to the reliability of the controls over both imported and domestic horses destined for export to the EU. It cannot be guaranteed that horses have not been treated with illegal substances within the last 180 days before slaughter'*. The audit team also noted an issue with consignments re-entering Canada after having been rejected and returned to the US on animal welfare grounds.

In 2016, Commission Implementing Regulation (EU) 2016/1832 came into force, requiring that horses have to be resident in a country for six months before slaughter (unless a monitoring plan had been applied to the animals in the six months before their slaughter). Thus, Canada can

[6] https://ab.co/2JoQfMq

[7] The 2007 audit report mentioned that between 2004 and 2006 about 16,000 live horses were imported annually from the US for immediate slaughter. These figures were expected to increase, given the ban on funding for horse meat inspection in the US.

no longer slaughter horses directly upon arrival from the US but has to keep the animals for six months. The Commission also requested Canada to put provisions in place on the administration of medical substances to horses that respect applicable EU rules. The audit in the same year on residues was satisfactory, recording progress. Another audit took place in 2018 to verify whether these new requirements had been met. The document still identified issues linked to the reliability of controls on both imported horses (coming from the US) and domestic ones, with the exception of horses kept on feedlots for a six-month period.

The new regulation, however, has negatively impacted the horses' welfare, as TSB and AWF investigations from 2019 demonstrate. The animals are kept in horrifying conditions in open-air feedlots, without any protection from the weather or veterinary care for six months until they can be slaughtered. The investigations showed that suffering horses are left to die without assistance, and new-born foals freeze to death in winter. These issues now need to be added to already existing problems in relation to animal welfare at the time of slaughter and during transport. Transport is indeed an area that warrants further attention, as long transport times are common with only two slaughterhouses in all of Canada and many horses that are of US origin. In Canada, horses can legally be transported for 36 hours without water, feed or rest. In addition, investigations revealed that horses unfit for transport were loaded onto trucks, and that young horses were mixed with adults (posing a risk of them being trampled). Thus, serious welfare concerns arise over the length of transport, as well as its conditions.

MEXICO

Mexico is the third largest producer of horse meat worldwide, slaughtering 590,000 animals per year. The country has exported 2,600 tonnes of horse meat in 2016, primarily to Vietnam, Russia and Japan. However, before 2015 the EU was the main market destination for Mexican horse meat, in particular Belgium and the Netherlands. Notably, around 85% of horses slaughtered in Mexico used to be of US origin.[8] So-called US kill buyers acquire working, racing and companion horses, mainly at auctions, to be transported to horse slaughter plants in Mexico and Canada.

Two audits in 2008 detected issues with the traceability of horses and concluded that it could not be guaranteed that EU requirements were always met. In addition, one report observed poor welfare conditions in the lairage (place where animals are kept before slaughter); yet no recommendations to improve animal welfare were made. The same report also concluded that the establishments could be considered compliant overall, and that no immediate risks to human or animal health were identified.

Following a more favourable 2010 audit that had not identified any major shortcomings, a 2011 audit on residues concluded that *'the guarantees given on horse meat exports to the EU are insufficient to guarantee that equivalent standards to those provided for by EU legislation are applied'*. An audit in 2012 came to the same conclusion, criticising identification methods and the lack of traceability of horses and their medical records.

The European Commission carried out another audit on horse meat production, certification and residues in Mexico in June/July 2014 – subsequent to the EU horse meat scandal, investigations by animal protection organisations and public concern. The report concluded that no significant improvements in relation to identification, traceability and residues had been made since audits held in 2011 and 2012, despite guarantees provided by the Mexican authorities. Official controls were found to be deficient or completely lacking on live animals (in particular in authorised assembly centres, where identification of the animals should take place).

As horses in Mexico and the USA are not considered to be food producing animals until they are designated for this purpose, widely available substances prohibited for food producing animals can be legally administered. No controls are in place to verify the authenticity and reliability of the affidavits (sworn statements) provided by horse owners, stating the medication history and a declaration on non-use of prohibited substances. In addition, the audit team noted serious animal welfare issues during transport and at arrival at the slaughterhouses. Indeed, the auditors' conclusion states:

'While EU requirements regarding Animal Welfare during transport are not applicable in third countries, the findings of this audit corroborate information received from various nongovernmental organisations and confirm the very poor conditions in which horses are transported.'

Although the report stated that the residue monitoring plan had been largely implemented, with no relevant findings in Mexico or at EU border inspection posts in recent years, the approval of the residue monitoring plan for Mexico was suspended in December 2014 (and applied as of

[8] Based on the European Commission audit report from 2014, which contains data provided from food business operators to the Mexican authorities between 2010 to mid 2014.

2015). This decision was based on the absence of reliable checks to attest that prohibited substances had not been administered to the animals. The suspension of approval constitutes a de facto import ban of Mexican horse meat and derived products. The suspension, however, could be reversed if Mexico provides sufficient guarantees on its controls, and another audit confirms that the deficiencies have been rectified.

UNITED STATES

The US used to produce horse meat up until 2007, primarily for the export to the EU rather than domestic consumption. In 2006, however, the US Congress banned funding for the United States Department of Agriculture for inspecting horse slaughterhouses. This constitutes a ban on commercially produced horse meat, as meat cannot be traded without having been inspected. Notably, it has been suggested that individuals could still slaughter horses for their personal use.

Although the law does not explicitly prohibit the slaughter, only the sale of horse meat, no more horse slaughterhouses have existed in the US since 2007. Thus, owners looking to abdicate their responsibilities for their horse could opt for costly euthanasia, abandonment of the animal, or selling the horses at auctions and to kill buyers. The latter buy horses that are then transported to Mexico or Canada for slaughter and horse meat production. Hence, since the de facto ban, 160,000 horses have been transported every year from the US to Mexico and Canada in order to be slaughtered there. Animal protection organisations have documented the cruel conditions to which the animals are subjected in the US at auctions, in export feedlots, during transport and at the slaughterhouses in Mexico and Canada.

Between 2011 and 2014, the ban was temporarily lifted by the Obama administration in order to control a rising equine population. Abattoirs were proposed, but ruled out by individual towns. The administration under Trump proposed to ease the ban again in May 2017, arguing that selling horses for slaughter would save considerable costs related to the feeding of wild horses. The funds for this measure, however, would not be allocated to USDA inspections, meaning the animals' meat cannot be sold. In April 2019, a bill was introduced at the US Congress, which if passed, would deem equine meat as unsafe for human consumption as the horses receive drugs and substances not approved for use in animals intended for food production. The bill, entitled the Safeguard American Food Exports Act (SAFE), would also outlaw the live export of horses for purposes of human consumption on the same grounds.

URUGUAY

The Uruguayan horse meat case strongly resembles the situation in Argentina. Inadequate identification, lack of traceability and animal welfare issues are widespread and have been known to the European Commission for quite some time. This is demonstrated by a 2007 and a 2009 audit report criticising these points. In relation to animal welfare, the 2007 report mentions for example that *'measures taken for stunning horses are not enough to ensure that they are spared avoidable pain or suffering during slaughter'.*

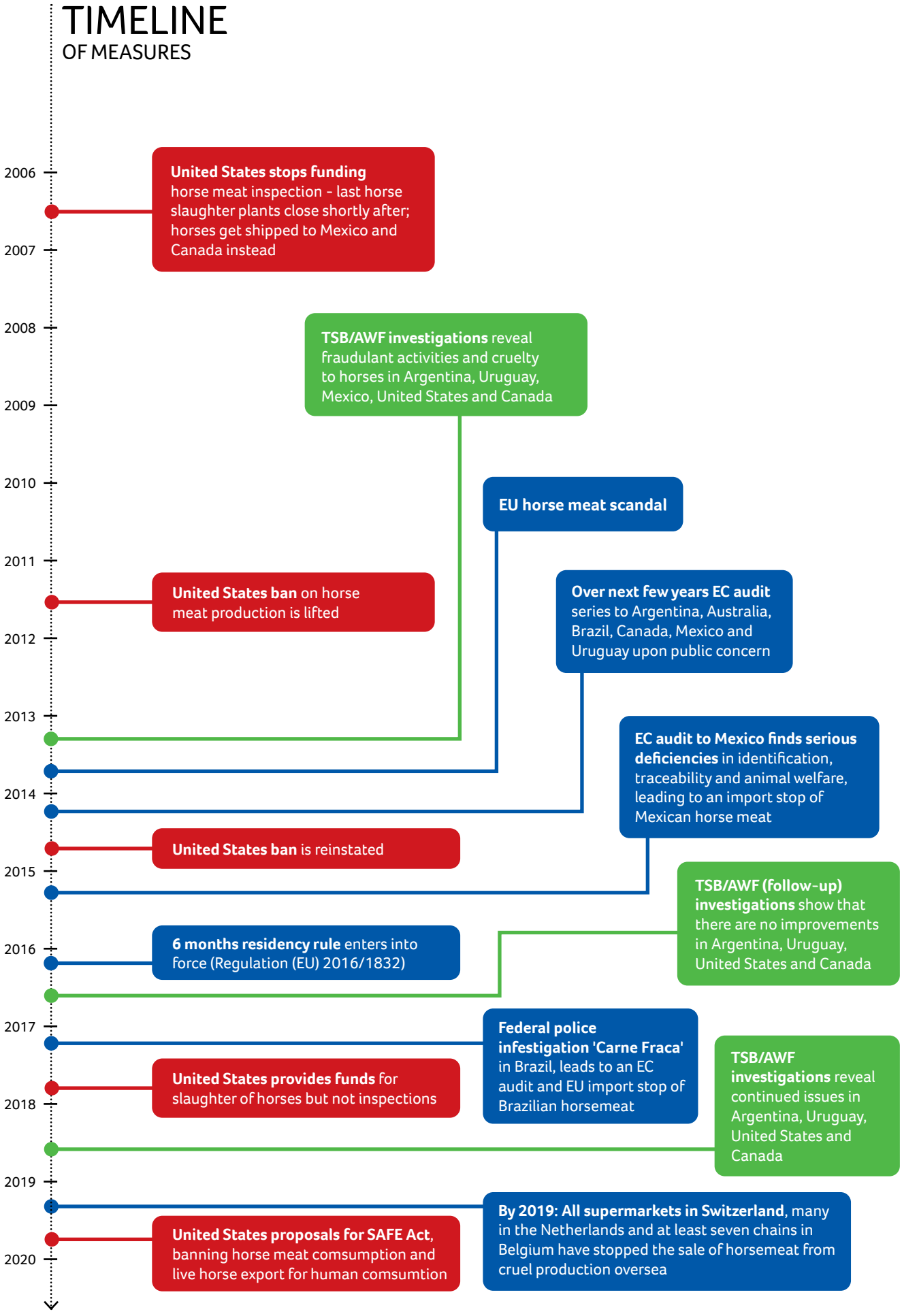
Audits in 2010 and 2015 on residues were more favourable, noting progress. The more positive conclusion was based on Uruguay's decision to exclude sport horses from the food chain, which should be verifiable as sport horses are obliged to be microchipped. In addition, the country had communicated they would implement an affidavit system after 2015 (i.e. horses need to be accompanied by a sworn statement on their origin and medical treatments).

A 2016 audit on public health, however, found that the system in place did not provide adequate guarantees, in particular in relation to the requirements for residency at holdings, administration of veterinary treatments and for animal welfare at the time of killing. In addition, the audit team was informed of an ongoing problem with smuggling and theft of horses from Brazil. The 2018 audit report similarly found weaknesses in this regard. Interestingly, the audit team was unable to assess controls at the assembly centres in 2018, as none of them were found to be in operation – contrary to the specific request from the audit team before the audit, as stated in the report. Furthermore, the report highlighted significant animal welfare issues:

'As regards animal welfare, and although previous shortcomings in relation to stunning and bleeding were corrected, the official controls in the assembly centres do not ensure that EU and national welfare requirements are met, and were not effective in correcting established non-compliance. Moreover, and although the centres were found not in operation and no animals were therefore present, the centres' records on the one hand, and the condition of the centres on the other, clearly indicate that when in operation and with the numbers of animals present, animal welfare would be compromised.'

These audits happened alongside TSB's and AWF's investigations, released in 2014, 2016, 2017 and 2019, into the cruel conditions to which horses are subjected, as well as the fraudulent practices in relation to identification of horses in Uruguay and in EU-approved slaughterhouses. The investigation published in 2019 also indicates that changes made by slaughter plants and related facilities just before the audits are only short-lived.

TIMELINE
OF MEASURES



3
HORSEMEAT IN FIGURES

In 2019, the EU imported 16,140 tonnes of horse meat, mostly from Argentina (9,833 tonnes), Uruguay (3,598 tonnes), Canada (1,394 tonnes) and Australia (1,090 tonnes). Up to 2018, Brazil and Mexico were also relevant sources, until the EU no longer approved Mexico's residue monitoring plan in 2015, and all Brazilian horse meat slaughterhouses were removed from the list of approved establishments in April 2017. Looking at the supplied tonnes per country over the last ten years, the most important sources of horse meat in descending order are Argentina, Canada, Mexico, Uruguay, Brazil, the US[9] and Australia.

Since Argentinian export volumes of horse meat reached their lowest level in 2014 (5,547 tonnes), they have risen by 77%. Canadian exports decreased by 66% between 2014 and 2018 (from 3,739 tonnes to 1,266 tonnes) and imports from Uruguay increased by 110% over the same period (from 1,834 tonnes to 3,854 tonnes). The Canadian decrease might be related to unfavourable EU audits, investigations by animal protection organisations, as well as the decrease in the supply of US horses. At the moment, there are 4 EU-approved slaughterhouses in Argentina, 3 in Uruguay, 2 in Canada and 2 in Australia. The Map below provides an overview of these establishments (the names given are as provided to the European Commission, and the city and region where the slaughter plants are located).

Argentinians and Uruguayans do not consume much horse meat. The production of such meat in their countries primarily serves the European market. Based on FAO production and export figures from 2015 and 2016, Argentina exported as much horse meat as it produced. Uruguay exported 68% of its production volume (69% of which was destined for the EU market between 2015 and 2016), Canada 52% (36% of which was shipped to the EU), and Australia 6% (55% of which went to European Union).[10]

The primary destinations for horse meat are the Netherlands, Belgium and Italy; but also Luxembourg, France, Finland and Germany. The Map above provides an overview of the main entry points for horse meat from each third country supplier (given in descending order in relation to import volumes). It is important to note that with statistics provided by Eurostat, it is nearly impossible to track the subsequent movement of the meat on the European market.

Argentina	the Netherlands, Belgium, Italy, France, Finland
Canada	France, Finland, the Netherlands, Luxembourg, Belgium
Uruguay	the Netherlands, Belgium, France
Australia	Belgium, France

Figure: EU imports of horse meat

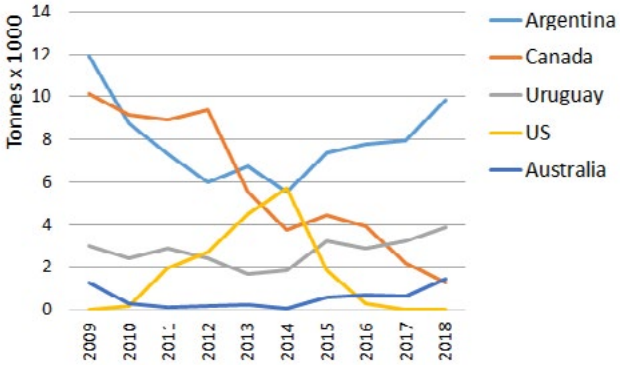
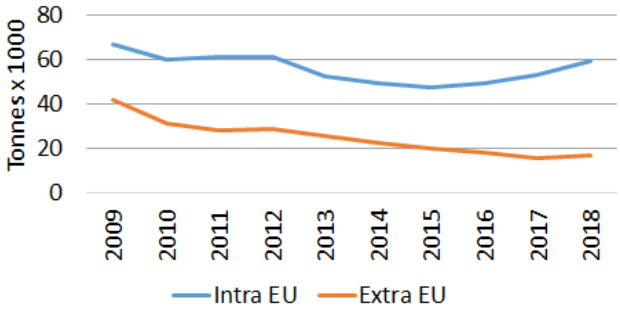


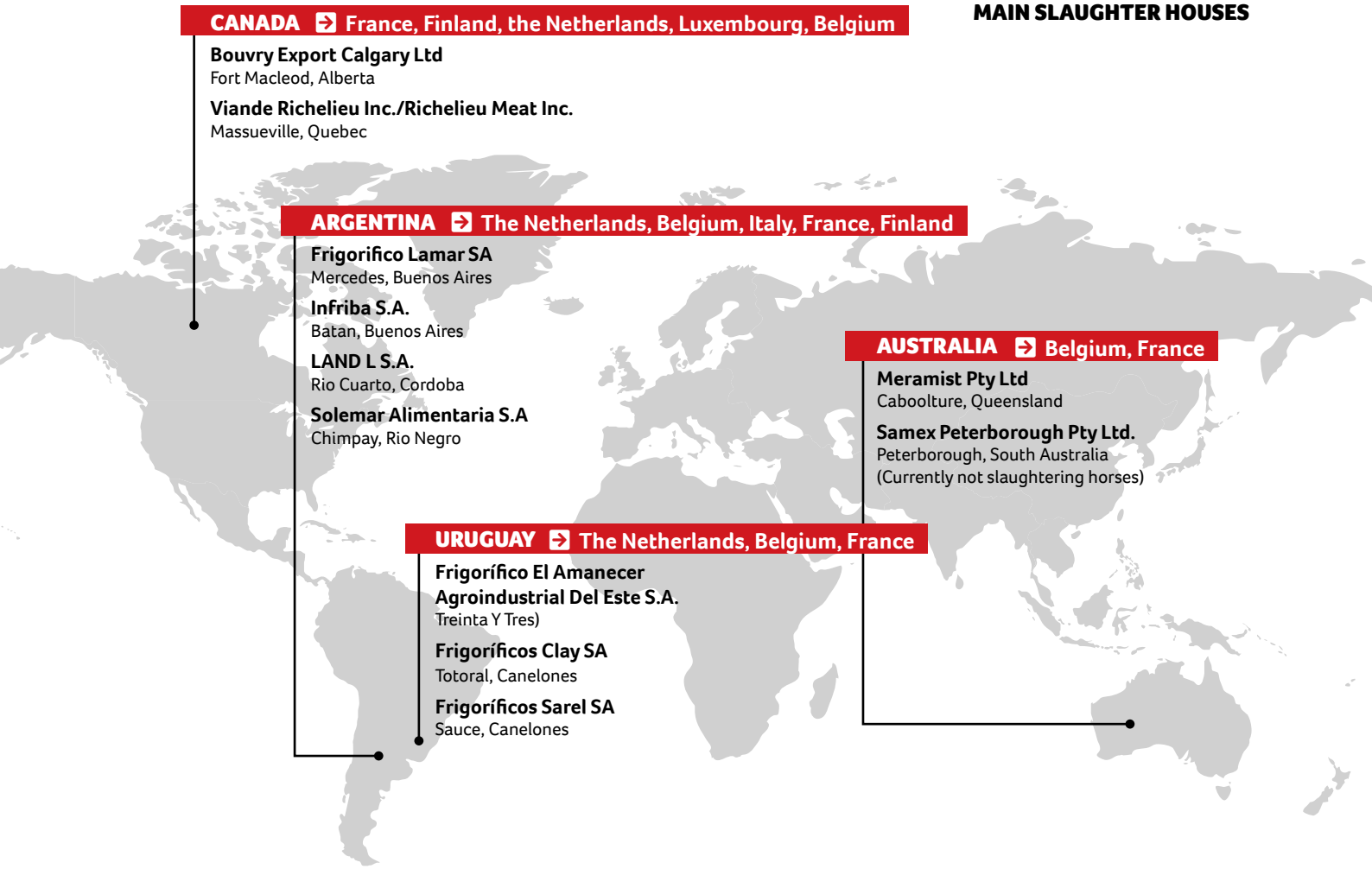
Figure: EU horse meat trade



[9] Slaughter of horses for human consumption has been de facto banned in the US since 2006 and the US is not authorised to export horse meat to the EU (as it lacks an approved residue monitoring plan and approved establishments). The available data in Eurostat most likely refers to horses of US origin that were slaughtered in Canada (or in Mexico before 2015).

[10] It is likely that the majority of the produced horse meat is for non-human consumption, for example used in pet food, which is, however, not acknowledged in the export data. Domestic consumption in Australia is most likely very small as horses are not considered food producing animals and only one butcher in Western Australia was granted a licence to sell horse meat for human consumption. The butcher stated that he slaughters 20 horses per year.

MAP:
MAIN SLAUGHTER HOUSES



Despite increased exports to the EU from Argentina, Uruguay and Australia over the last few years, the total volume of horse meat originating from non-EU countries has fallen (extra-EU). Internal EU trade, which can include re-export from meat originating from outside the EU (intra-EU), also experienced a decline up until 2015. Since then, trade numbers have been rising, with 2018 volumes almost reaching volumes traded pre-2013, i.e. before the EU horse meat scandal.

Overall European trade of horse meat (combining exports to EU and non-EU countries) is dominated by Italy, Belgium, the Netherlands and France. In comparison, countries leading in terms of EU internal export volumes (including potential re-exports) are Belgium, the Netherlands and Romania. For the Netherlands and Belgium, it can be assumed that a significant volume of their exports to EU Member States are re-exports, meaning that the countries export meat that they imported from outside the EU. Belgium, Germany and France are the main EU destinations for (re)exports from the Netherlands within the EU, while Belgium (re)exports primarily to France, Italy, the Netherlands and Germany. Romania in contrast has hardly imported any horse meat, but exports significant amounts. Within the EU, large amounts of Romanian horse meat arrive in Italy, Bulgaria, Belgium and Poland.

Belgium is a key player in the global equine meat trade. Belgian companies either (co)own several (EU-approved) abattoirs or engage in joint ventures with local partners in North and Latin America, Australia and New Zealand. For example, the EU-approved slaughterhouse Lamar in Argentina is mentioned by the Belgian meat trading company Equinox under 'Our brands'. The EU-approved slaughterhouse Sarel in Uruguay belongs to the Belgian importer Multimeat. The Belgian firm Benimplex NV belongs to Multimeat, the parent company of Australia's largest abattoir Meramist, and shares similar directors; and Samex Peterborough processes its meat for the Belgian Velda NV. The majority of horse meat imported by Belgium is then subsequently re-exported to other EU Member States; the primary destinations being France, Italy, the Netherlands and Germany. Notably, many supermarkets in the Netherlands, at least seven chains in Belgium and all in Switzerland have stopped the sale of horse meat from cruel production overseas, in response to the investigations and awareness raising by Eurogroup for Animals' members (such as TSB, AWF and GAIA).

4
KEY ISSUES IN HORSEMEAT PRODUCTION

Assembly centre, Argentina. © Animal Welfare Foundation

The key issues of the horse meat trade should have become apparent by now: animal welfare concerns at slaughter plants and related facilities, as well as during transport, and the traceability and identification of horses (and thus food safety concerns). In addition, and another concern has been raised in recent years as exhausted mares, used for the production of equine chorionic gonadotropin (eCG), enter the production chain for horse meat.

4.1
WELFARE AT SLAUGHTER PLANTS AND RELATED FACILITIES

Investigations by TSB and AWF, as well as Animals' Angels USA (Advocacy & Investigations) have revealed shocking conditions and maltreatment of horses at assembly centres, during transport and at slaughterhouses in Argentina, Uruguay, USA and Canada. At the moment, EU requirements on animal welfare for imported animal products only apply to animal welfare at slaughter.

As the investigations demonstrate, even those minimum requirements are not met. In fact, the international standards of the OIE are not met either, such as:

- Sick, weak and injured animals should receive immediate treatment or be killed humanely and immediately if necessary;
- Injured or sick animals, requiring slaughter, should be killed humanely and without delay;
- Handling should be done in a way to avoid harm, distress or injury;
- Protection from unfavourable climatic and weather conditions should be provided;
- Suitable feed should be available on arrival and at intervals appropriate to the species.

On numerous occasions, the investigations detected cases of severely emaciated, injured, lame, sick and weak horses, as well as pregnant mares and foals not separated from other horses. Animals in need of veterinary treatment

were not attended to for more than a month at assembly centres. Neither were emergency kills carried out for welfare-compromised animals and suffering horses were left to die without assistance.

Untrained or incompetent staff handled the horses violently in order to move them along. This included for instance beating, strong water jets aimed in the animals' faces, the use of electric prods (which are prohibited in the EU for horses), and dogs used to round up the animals.

The requirements in terms of climatic and weather protection were not met either, as horses often had no shelter available. Clean and dry resting areas were lacking and/or no bedding was provided. Instead the dirt floor would turn into mud during heavy rain. Several fences posed a considerable risk of injury. In many cases, only minimum feeding was provided, if any, causing horses to fight for food. The crowded conditions in holding pens caused stress, kicking and biting.

Thus, EU Regulation 1099/20009 on requirements for slaughterhouses were violated on numerous occasions, in particular in relation to the emergency killing of suffering horses, access to weather protection, availability of feed, the use of electric prods, etc.

Transport requirements in North and South America[11] also lag far behind EU transport requirements. Unfit animals, as well as mares and foals mixed with other adult horses, were frequently observed being transported to slaughterhouses. The vehicles, which are cattle trucks, are usually unsuitable for such transport and bear a high risk of injuries. In these vehicles, horses are not transported in individual stalls, as required in the EU on long journeys. The countries' national legislation only insufficiently protects animals during transport and slaughter. Uruguay has no legislation on transport; Argentinian and Canadian legislations permit transport for 36 hours without food or water. Unfortunately, the EU transport requirements do not apply for imported products. Nevertheless, reports from EU audits in Mexico and Brazil have commented on poor animal welfare conditions during transport in these countries and the 2014 audit report on Argentina's horse meat sector indicated that most deaths on arrival at the slaughterhouse were due to *'inadequate conditions of transport'* or to the fact *'that some animals had pre-existing conditions which were aggravated during the transport'*.[12]

The investigations demonstrate systematic abuse, mistreatment and neglect; and the situation has not improved since 2012 despite promises of EU and Swiss importers. In response to the investigations and public concern, the Respectful Life initiative was created by the importers' association FEBEV (Belgium) and VPI (Switzerland), and entrusted to the Catholic University of Leuven for scientific oversight. However, the research conducted does not equal a proper audit and verification of animal welfare standards in the production of horse meat. Other commissioned audits carried out by Société Générale de Surveillance (SGS) only considered the management system of the production unit and thus, would not have detected animal welfare issues.

Another problem is that audits and visits need to be announced and the sites visited take temporary measures to improve the conditions. These measures are, however, only short-lived, as for example, a few days after the audit, emaciated and injured horses will appear again at slaughter plants and badly built shelters for potential weather protection will collapse after a few weeks.

The pre-slaughter mortality for horses is high and the lack of veterinary treatment and emergency killings also constitutes a food safety concern. When existing injuries are not treated and extensive open wounds persist, it can be assumed that germs may spread through the horses' body. Bacteriological sampling is then necessary to determine if the derived meat is still safe for human consumption.

In addition, in the case of Canada, since horses imported from the US need to reside in Canada for six months before slaughter as per an EU regulation from 2016, prolonged suffering of horses occurs in feedlot pens. The animals are kept in those pens without access to weather protection and without veterinary treatment or emergency killing. Pregnant mares and other adult horses are mixed, also leading to foals being born unnoticed and freezing to death during the harsh Canadian winter.

In Australia, the investigation broadcast in October 2019 unveiled very poor slaughter conditions at the Meramist plant, which is approved for export to the EU. The horses were systematically tortured. They were beaten, kicked and received electric shocks. Stunning failure occurred regularly, and many horses were shot several times. Some horses were hoisted and bled while still showing signs of consciousness. The investigation also showed many dead horses being unloaded after a long-distance transport.

[11] Argentina, Uruguay, Mexico, the US and Canada.

[12] https://ec.europa.eu/food/audits-analysis/audit_reports/details.cfm?rep_id=3375

Truck arriving at Meramist slaughterhouse, Australia.
© Animal Welfare Foundation

4.2
IDENTIFICATION AND TRACEABILITY

Identification of horses and traceability of the animals and their products has been a long-standing concern. The EU horse meat scandal in 2013 demonstrated the complexity of the long supply chains and several operators involved in the horse meat industry. In countries like Argentina and Uruguay the supply chains are even more concerning. The horses slaughtered for their meat do not stem from commercial breeding and raising for such purposes. They are riding, work or sports horses, no longer fit for purpose (due to old age, illness, injury, or declining performance), exhausted Criollo breeding mares, young horses that do not meet the criteria for breeding, and horses from blood extraction centres (for the production of eCG). These horses, also called 'descartes' (meaning 'trash'), have repeatedly changed owners through auctions and markets, or have been collected by horse dealers from farms.

Given the lack of reliability of the equine identification system in Argentina and Uruguay, the actual horses' origin is unknown. Microchipping and equine passports (including the medical history of the horse over a lifetime) are standard in the EU. In Argentina and Uruguay, by contrast, the usual practice involves ear-tagging and sworn statements by the last owners concerning medical treatments in the last six months. Argentinian legislation stipulates that slaughter horses are required to be ear-tagged when leaving the holding of origin and accompanied by a sworn statement, while Uruguayan legislation requires the last owner to ear-tag the animal before delivering it to a registered assembly centre.

However, even these minimal requirements are not always adhered to. TSB and AWF have repeatedly documented fraudulent activities in relation to ear-tagging, demonstrating the lack of reliability of these methods. For example, ear tags were applied at slaughterhouses or were removed upon arrival at assembly centres, and a large number of horses at assembly centres and slaughterhouses had no ear tags. Also, EU audits in these countries have identified weaknesses and deficiencies concerning identification and traceability of the animals, such as incidents of missing ear tags and lack of identification procedures (e.g. European Commission audit to Argentina in 2014). Thus, it is likely that a significant amount of horse meat is sold on the EU market that has not been produced according to EU food safety requirements. Such concerns eventually led to a halt to imports of Mexican horse meat in 2015. Such bans are, however, only implemented on grounds of food safety and not for animal welfare reasons.

Weaknesses in relation to identification, traceability and resulting food safety concerns over veterinary medical treatments have also been raised for horse meat from Australia, where most slaughtered horses are discarded racehorses, and Canada. A European Commission audit in Australia in 2015 identified, for example, weaknesses in relation to the owner's sworn statements and concerning the legal administration to horses of substances that are not authorised to be used in food producing animals in the EU. The 2019 audit remained critical on traceability and food safety stating that the recommendations of the previous audit had not been implemented, and that residue testing demonstrated the lack of reliability of vendor declarations. Such concerns were also significant in the case of Canada, where an audit in 2015 identified deficiencies, in particular concerning horses from US origin. The Commission addressed these concerns with Commission Implementing Regulation (EU) 2016/1832, requiring US horses to reside in Canada for six months before slaughter, and requesting Canada to implement provisions for the administration of medical substances to horses that respect applicable EU rules. A residue audit in 2016 was more favourable, reporting progress on this matter. However, the 2018 audit identified issues in relation to the controls on both horses imported from the US and domestic ones, with the exception of horses kept on feedlots for six months.

On top of the lack of identification and traceability, corruption is another concern, notably in South America. Argentina ranks 85th out of 180 countries, scoring 40 out of 100 (a score of 100 indicating no corruption) according to the Transparency International Index. The country's corruption is particularly prominent in the sector of fisheries (although corruption cases have gone down by 90% in the last few years, due to a new regulatory framework)[13] and land tenure. However, other areas including the horse meat sector are also concerned as the 2018 audit report on horse meat to Argentina demonstrates. The report mentions that the entire staff of a local office of the competent authority responsible for inspections was dismissed in July 2018 following an investigation that confirmed corruption and underperformance. This situation makes it possible for stolen and smuggled horses to enter the meat chain. In Argentina, stolen horses have repeatedly been discovered at slaughterhouses. The Uruguayan police also has its own task force against horse smuggling from Brazil, which has been banned from importing horses due to an outbreak of glanders in 2015. A 2016 audit report by the European Commission identifies the theft of horses in Southern Brazil and smuggling as a serious concern in Uruguay. Fraud and corruption led the Commission to halt horse meat imports from Brazil in 2017.

[13] Agriculture, fisheries and livestock fall under the same Ministry

Several concerns arise, in particular in relation to food safety, in case of insufficient or lacking identification and traceability of horses and horse meat. Horses are in many countries primarily considered a companion animal or used for sports purposes. Only later in life, when they are no longer fit for racing or rodeos, or when owners would like to abdicate their responsibilities for the animal, do horses instead enter the food chain. However, they might have been treated with substances, such as steroids or growth promoters, that are prohibited in the EU to be used in animals for food production. As individual horses may have changed owners at several occasions throughout their lifetime, it is difficult to establish a clear medical track record.

Identification is important to ensure that no animal unfit for human consumption enters the food chain. Identification is closely linked to traceability and the reliability of any medical track records or guarantees. As the situation in Uruguay and Argentina demonstrates, identification is also important to prevent fraudulent activities, such as stolen and smuggled horses entering the food chain.

Lastly, non-EU producers can sell more cheaply produced horse meat on the EU market, as they do not have to adhere to the strict requirements applying to EU horse meat producers in relation to identification, traceability and animal welfare. This is de facto undermining EU producers. In addition, consumer protection is at risk as horse meat from third countries can be sold in the EU without having a clear label of origin. Country of Origin Labelling (CoOL) for fresh and frozen equine meat would thus enhance consumer protection. Given the differences in regulations between the EU and non-EU countries and welfare and traceability problems, this would allow consumers to make more informed choices.

4.3 EQUINE CHORIONIC GONADOTROPIN (eCG)

Equine chorionic gonadotropin (eCG), also known as pregnant mare's serum gonadotropin (PMSG), is a hormone produced by pregnant mares between the 40th to 130th day into their pregnancy. The hormone is extracted from the mares' blood and used to induce follicular growth, oestrus and ovulation in sheep, goats, cattle, and pigs. Other uses are the synchronisation of these processes in animals, to advance puberty in pigs, increase litter sizes in sows, and for artificial insemination and embryo transfer in cattle. In Germany, for example, the primary purpose of eCG is the synchronisation of sows' heat. 1.3 million doses are applied in Germany yearly. However, the use varies between countries and species. The global sale of eCG is estimated to be around US$65-70 million. Veterinarians disagree on whether eCG is essential or not. Synthetic alternatives to eCG are already available on the market.

Downer horse left to die without assistance at Lamar slaughterhouse - Argentina. © Animal Welfare Foundation

Blood collection centres (or 'blood farms') are mostly located in Argentina, Uruguay and Iceland. Investigations in Argentina and Uruguay by Animals' Angels, together with an international alliance led by TSB/AWF, exposed that the mares' welfare is severely compromised at these blood farms, due to cruel handling, lack of veterinary treatment, high volume and frequency of blood extractions, and induced abortions at advanced stages of the pregnancy, which can cause complications, pain and stress. For example, several farms reportedly extract 10 litres of blood weekly, which is beyond the scientific recommendations on the amount and frequency of blood extraction. European standards would allow a maximum extraction of 3.4-4.5 litres once a month, depending on the horse's weight. If too much blood is taken too frequently, the mare may become anaemic, can suffer a miscarriage or from a weakened immune system. Biannual termination of pregnancy either manually or using medication is another disturbing practice.

Blood collection, which has been ongoing for over 30 years, is not covered by animal protection laws in Argentina or Uruguay. Neither have importing countries controlled the production or asked for controls on the keeping, treatment and blood extraction methods. eCG is currently licensed in all EU Member States. Upon international outrage following the investigation's publication in 2015 and 2018, however, several pharmaceutical companies have now started to source eCG only from European blood collection centres.

In 2017, the pharmaceutical company MSD Animal Health (Merck/Intervet) decided to no longer source eCG from South America. Other importing companies promised to take control of the situation by implementing trainings, audits and new manuals (which are, however, not legally binding). Uruguay also produced a new manual on good animal welfare practices for eCG production, which was introduced in June 2017. Despite these promises, another investigation in early 2018 demonstrated that the only thing that has changed are the methods of abuse. Instead of hitting mares on their heads with sticks and wooden boards, staff were observed using iron hooks or stabbing the horses' genitals with sticks. Veterinary treatment is still not administered to injured, sick or emaciated horses, which are left to their own devices. In June and August 2018, the pharmaceutical companies IDT Biologika and Ceva Santé Animale respectively also announced they no longer sourced eCG from South America. The EU importer Hipra (Spain) is yet to follow suit. In comparison, Zoetis, the largest medicine and vaccination producer for pets and livestock (based in the US, with a branch in Italy) has stopped EU imports of eCG in 2016. Nevertheless, the company purchases eCG from the blood farm Syntex in Argentina and signed an asset purchase and manufacturing agreement with Syntex in 2015.

Blood extraction is a lucrative business in Argentina and Uruguay, and Uruguay reportedly even subsidised one farm. The biggest eCG producing company worldwide is Syntex S.A. in Argentina, with a subsidiary in Uruguay. Based on the NGO investigations, Syntex in Uruguay is also one of the largest suppliers of horses for the EU-approved horse slaughterhouse Clay, having transported 795 horses for slaughter in 2014.

4.4
LABELLING AND CONSUMER AWARENESS

Country of origin labelling is a way of enabling consumers to better understand where animals have been born, reared and slaughtered. Such knowledge can empower citizens to make conscious choices.

While horse meat only constitutes a small part of (3%) of the total meat consumption in the EU, the equine meat industry often has longer supply chains than for other categories of meat[14] in many cases relying on imports from third countries. Such long supply chains create high environmental costs through long-distance transport of live animals[15] that does not comply with the ambitions set out in the European Green Deal.

Bearing in mind that some of the biggest exporters of horse meat to the EU are third countries where horse slaughter raises serious concerns and where standards are below the European ones, it is necessary to ensure the transparency of horse meat products on the EU Internal Market. Considering the existing evidence, various European institutions and civil society organisations have been calling the European Commission to reconsider the extension of the country of origin labelling to other types of meat.

- In 2015, the European Parliament's Committee on the Environment, Public Health and Food Safety (ENVI) adopted a Motion for Resolution[16] urging the Commission to follow up with legislative proposals to make the indication of origin mandatory for meat in processed foods in order to restore consumer confidence and help ensure better traceability along the food supply chain.

- The report Removing the Blinkers (2015), which illustrates in detail the challenges concerning equine welfare in the EU, recommended the Commission extend the labelling rules. According to this report, equine meat should be subject to equivalent provisions and labelled with its country of origin, rearing and slaughter as other types of meat are required to be in order to ensure a level playing field and welfare-aware choices by consumers.

- Members of the European Parliament (MEPs) have also urged the Commission on many occasions to extend labelling rules. In a Parliament resolution[17] of January 2014, the Commission was pressed to present legislative proposals making the indication of the origin of meat in processed foods mandatory. In 2015, they called for country of origin labelling of meat in processed foods. According to the Parliament resolution, meat used as an ingredient in processed food should be labelled by country of origin. In 2016, MEPs reiterated once again their call for a mandatory country of origin labelling of meat and milk. All three resolutions aimed to better inform EU consumers and improve their confidence in food products by making the food supply chain more transparent. The suggestion in all cases was that labelling the country of origin would help to ensure better traceability along the food supply chain, thus restoring consumer confidence. Additionally, in 2016, a question for written answer was addressed to the Commission regarding country of origin for meat asking when it would propose mandatory country of origin labelling for horse meat.[18]

- BEUC – the European consumer protection organisation – recommends that origin labelling should become mandatory for all meats, milk, unprocessed foods, single-ingredient foods and ingredients that represent more than 50% of a food. This view has been maintained in BEUC's response to the roadmap on origin labelling of meat.[19]

- Finally, given that nine out of ten European citizens believe that imported products should respect EU animal welfare rules, the Commission has a clear opportunity to improve transparency in the food supply chain. CoOL would enable consumers to purchase meat derived from short supply chains, which present benefits from an animal welfare, environmental, and food safety perspectives.

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[14] According to the European Commission Report (2015).

[15] Transporting meat as opposed to live horses would cut transportation costs by about 52%. pp. 23-24 https://www.eurogroupforanimals.org/wp-content/uploads/Eurogroup-for-Animals_A-strategy-to-reduce-and-replace-live-animal-transport.pdf and https://www.researchgate.net/publication/40799072_Sustainable_production_transporting_animals_or_meat

[16] ENVI Motion for a Resolution. https://www.europarl.europa.eu/EPRS/EPRS-AaG-548972-Country-of-origin-labelling-for-meat-in-processed-foods-FINAL.pdf

[17] See the resolution here.

[18] https://www.europarl.europa.eu/doceo/document/E-8-2016-002213_EN.html?redirect

[19] https://ec.europa.eu/info/law/better-regulation/initiatives/ares-2018-3112936/feedback/F14364_en?p_id=302813

5 HOW TO EFFECTIVELY PROTECT HORSES INVOLVED IN MEAT PRODUCTION

The key objectives to ensure better equine protection, in particular in Argentina, Uruguay, Australia and Canada, thus include:

1. All imported equine meat must comply with **EU animal welfare standards at slaughter** (which are currently the only applicable animal welfare requirements for imported meat).

2. All imported equine meat should also respect **other animal welfare standards applied in EU horse meat production** (e.g. related to transport, in assembly centres and in horse feedlots).
   - This means trade agreements should contain provisions on **conditional liberalisation** of horse meat imports (i.e. liberalised access to the EU market would be contingent on meeting equivalent welfare standards).

3. **Suspension of imports from countries if EU audits demonstrate a lack of enforcement** of the applicable provisions of the regulation on welfare at the time of killing and traceability requirements.

4. Allowing for the **possibility of unannounced audits**.

5. **Suspension of imports** (e.g. from Mexico and Brazil) **are not reversed unless the production meets the required EU animal welfare standards as confirmed by EU audits**.

6. Working to improve equine welfare outside the EU through **cooperation on animal welfare with relevant partner countries** (at present Argentina, Australia and Canada), using technical assistance where required.

7. Greater traceability of horse meat products by introducing **Country of Origin Labelling** (CoOL) **for fresh and frozen equine meat**.

8. **Reduced consumption of equine meat and derived products** (through member organisations reaching out to retailers and consumers).

5.1 CHALLENGES AND POSSIBILITIES

Horse meat cannot simply be banned as EU countries also produce it. However, cruelly produced horse meat, independent of its origin, should be prohibited. In addition, only EU welfare standards during slaughter apply at the moment, which are not always properly implemented and enforced. Welfare standards during transport and stricter requirements concerning traceability should be targeted too. As concerns mandatory labelling of origin, a report by the European Parliament concluded that it does not appear to be an appropriate way forward at EU level. Hence, the European Commission's proposal on country of origin labelling will be voluntary, except when the origin of the main ingredient is different from the country of origin of the food product.

Member States would have to approve any extension of current rules to cover meat products derived from equines. Some – notably net producers of horse meat such as Ireland and Spain – are opposed to this, due to potentially negative impacts on their horse meat industries, should consumers be more inclined to buy from their own countries. Additional challenges include resistance from food producers, increasing costs for small and medium sized companies, and adding confusion to consumer choices. Nevertheless, there is a growing trend in countries such as Italy and Greece towards more precise food labelling aimed at improving consumer protection.

5.2 CONCLUSION

Investigations, audits and scandals have all highlighted the need for greater protection of equine welfare in horse meat production in third countries, as well as for improved identification and traceability of horses in order to ensure food safety and prevent fraudulent activities. Eurogroup for Animals is lobbying the European Commission, Council and Parliament to improve equine protection. In particular, we are pushing for conditional liberalisation of horse meat and cooperation on equine animal welfare through mechanisms provided in free trade agreements, as well as mandatory country of origin labelling for horse meat and derived products.

EUROGROUP FOR ANIMALS