



Crustacean Compassion **Market insight and business impact research brief**

About us

Crustacean Compassion is a not-for-profit animal welfare organisation which campaigns for the humane treatment of decapod crustaceans such as lobsters, crabs, prawns and langoustines, based on scientific evidence of their sentience. Whilst some legal protections do exist, in the most part decapod crustaceans, as invertebrates, are not adequately covered under animal welfare legislation. This means that many shocking practices of slaughter, handling and storage which would be illegal in vertebrate animals, such as boiling alive, are permitted.

We have been campaigning for crustaceans to be included in the Animal Welfare Act 2006 of England and Wales and in the new Sentience Bill proposed by Michael Gove in 2018. Despite our small size we have received significant public and political attention. Our petition for decapods to be included in the legislation above has gained 50,000 signatures; our open letter has been signed by 56 eminent scientists, veterinary professionals, lawyers and wildlife experts; and 41 animal welfare organisations have signed onto our demand that decapod crustaceans should be protected in animal welfare law. These have prompted widespread media coverage and regular engagement with relevant government departments.

One of our key campaign aims is to ensure that all decapod crustaceans sold in the UK are electrically stunned before slaughter.

Current position

We recognise that the shellfish industry can have a valuable role to play in driving welfare improvements across the sector, and that businesses, as well as animals, can benefit from animal welfare initiatives. Indeed, we know that a number of leading fishery organisations are willing to take active steps to help meet increasing consumer and political demand for the welfare protection of decapod crustaceans, and that some are conducting their own research in this area. We are therefore looking to expand our corporate engagement with the shellfish industry.

Research aims

We want to gain a sense of the scale of the problem and the numbers of animals affected, as well as where progress is already being made by some companies. We would like to identify possible intervention points within organisations, practices and growing food trends where improvements in slaughter methods might be made in collaboration with the industry. We also want to be able to understand the financial impact of welfare improvements, such as a change in slaughter practices or a ban on purchase for home slaughter.



Summary of research scope:

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| SPECIES | Lobsters and crabs (exact taxa to be identified as part of the research) |
| LOCATION | Animals landed live in the UK (either locally caught or imported), and slaughtered in the UK |
| WELFARE ISSUE AT STAKE | Lobsters and crabs are not currently covered by welfare legislation at slaughter. Many are slaughtered by thermal shock, either boiled alive or in ice-water; or by freshwater drowning |
| RELATION TO CAMPAIGN AIM | We would like to see all lobsters and crabs sold in the UK electrically stunned before slaughter. |

Desired research outputs:

- A fully referenced research report in Word format, including a stakeholder power analysis. The report must be clear and written in user-friendly language for a non-specialist audience. Only an electronic version is required.
- To keep us informed of progress over email
- To reserve one hour post-report to iron out any clarifications
- Copyright for the report should be assigned to Crustacean Compassion, for the sole purposes of contributing to our corporate liaison work, referencing in our campaign work and for use in fundraising applications. Any other use will be subject to negotiation with the consultant.

Information we can provide you with

- Our draft business impact assessment from 2018 based on some market data from 2016-7
- Access to this 2016-17 data
- Information on available electrical stunning machines

Timescale

The final report needs to be submitted by 3rd July 2020.

Budget

This project is funded by a grant from the Centre for Effective Altruism. A maximum budget of £3,500 inclusive of VAT has been allocated for this research, which includes all expenses involved, including in accessing the relevant data.

Research questions

The below questions are designed to give an idea of our needs. However, the scope can be discussed in terms of our priorities, the access the candidate may have to the relevant data and the availability of information.

1) The UK market in lobster and crab since 2017 (we have existing research that needs updating)

- i) How much is the market in crab and lobster worth in the UK?
- ii) How are retailers segmented (eg fast food restaurants, elite restaurants, supermarkets) and where is the sector growing?
- iii) Demographics: who eats crab and lobster, and in what form?
- iv) What is the market share of each of the major stakeholders, both buyers and sellers, eg key processors, restaurants, supermarkets?
- v) Identify some key market trends (eg supermarket sales, whole vs processed products)

2) Mapping the supply chain

- i) From sea to plate, map out in detail how a lobster or a crab that is landed live in the UK ends up on our plates. Which key stakeholders does it come into contact with?
- ii) Who has the 'buying power' in the supply chain (suppliers vs distributors vs retailers) and how much do the leading companies of each segment sell/buy annually?
- iii) How many crabs and lobsters are caught in UK waters, how many are exported, and of those how many are exported live?
- iv) How many crabs and lobster are imported, and of those how many are imported live?
- v) What are the most common slaughter practices in the UK?
- vi) What and where are the major processing companies in the UK, who are they owned by, and what are their size?
- vii) Which of these own and use an electrical stunner, and is this the only slaughter method that they use? (we can provide some initial info)
- viii) Are there any current welfare initiatives/commitments in place at the major processing companies?
- ix) What certifications or guidelines in slaughter do the companies currently comply with?

3) The business impact of introducing humane slaughter practices

- i) Is it possible to quantify the product price increases necessary for restaurants to purchase an electric stunner?
- ii) What is the price elasticity of demand on crab and lobster - how would demand be affected by price changes? (Preferably expressed per crab/lobster)
- iii) Are there any existing willingness-to-pay examples – where consumers have successfully paid more for a higher welfare product?
- iv) Is there any business insight from countries where legislation already exists (eg New Zealand or Switzerland) on how a ban on boiling alive has impacted business?

4) Home slaughter practices

- i) What proportion of lobsters and crabs are sold live for slaughter *at home* by the consumer, and how are the retailers segmented (eg small fishmongers, Chinese supermarkets).
- ii) What is the scale of the business impact if a ban on home slaughter is introduced?
- iii) If they were only to be sold pre-killed to the consumer, how could food safety be ensured? (i.e. fresh sales, not frozen)



Consultant specification

- Expertise in commercial food business, particularly in animal products, and preferably in aquatic animal produce
- Ability to gain access to specialist market data from relevant shellfish organisations and agencies
- A proven track record in analysing published data and statistics
- Experience in compiling clear reports, accessible to a non-specialist audience
- Good numerical, analytical and problem-solving skills
- Methodical and well-organised, with the ability to complete projects to time and on budget
- An interest in animal welfare is preferable

Proposals

The closing date for applications is May 10th 2020

Please send a CV to campaigns@crustaceancompassion.org.uk with the names and contact details of two professional references, plus a covering letter which should clearly outline how you meet the consultant specification. Please also state your daily rate.

Respondents will be informed of a decision within one week of the closing date and invited to a telephone or Skype interview.

If you would like to discuss this proposal, please contact Maisie Tomlinson at campaigns@crustaceancompassion.org.uk