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Master Thesis

Meat politics in Austria – Analyzing actors, strategies and power resources governing meat production and consumption

submitted by

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Abstract

Meat consumption is increasingly discussed as a key lever for reducing environmental and human health impacts of global food systems. As is the case in many high-income countries, meat consumption in Austria exceeds dietary and planetary-health recommendations. How, and if, to address this overconsumption has become a site of political conflict making it important to understand the surrounding structures, institutions, and power relations. Increasingly, calls for governance measures toward sustainable dietary transitions make it important to consider the political economy of meat consumption and production in local contexts. Addressing incumbent actors and power relations has been identified as a key lever for changing food systems. Using a theoretical approach grounded in Food Regime Theory and critical state analysis, this thesis aims to shed light on important actors and power relations concerning meat consumption in Austria. The results of the qualitative analysis showed that in Austria there is a strong drive towards establishing a regime of national consumption rather than honestly addressing excessive production and consumption patterns. This especially serves the national producers and risks overshadowing the need to reduce consumption. Furthermore, it blocks a joint discourse to create new perspectives for agricultural production in the face of changing societal and ecological demands. Additionally, national producers and alternative production pathways are subject to the increasing power of the corporate sector, which can further economic and increasingly ecologically oriented rationalization to increase profits. Strategies to challenge this incorporating power have so far been sparse and unsuccessful. Rather, the reproduction of consumer power and responsibility in the producing sector serves to further this development as food retailers can effectively position themselves as the custodians of the consumers. Active government policies and the willingness to accept the necessity for changing consumption are required to redistribute this power.

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Positionality

Writing a master thesis has always been an ambition of mine. The idea of diving deeply into one topic to create a structured understanding of complexity has always been appealing. Over the years, I have found myself especially drawn to polarized questions that seem easily answered with absolute solutions. A few years ago, I would not have guessed that I would write about meat consumption. Having lived over 10 years as a vegetarian, it seemed too stereotypical that a vegetarian would write a thesis about barriers to reducing meat consumption. But statements by political representatives and discussions around our right to consume certain foods, most prominently, the Schnitzel, shocked and frustrated me. With all other things going on (climate crisis, biodiversity crisis, energy crisis just to name a few) how can this be our priority? And why is it so hard to have a constructive discussion about meat, without it getting emotionalized? While this frustration, on the one hand, led me to start eating meat again (my personal approach for more balanced footing) it also motivated me to try and create a structured understanding of the politics around meat. I hope that my approach to structure the conflict may contribute to a more constructive discussion that enables us to find cooperative pathways forward.

Table of Contents

ABSTRACT.....	I
ACKNOWLEDGEMENTS.....	II
POSITIONALITY	II
LIST OF FIGURES.....	V
LIST OF TABLES	VI
LIST OF ABBREVIATIONS.....	VII
1. INTRODUCTION.....	1
1.1. SCIENTIFIC BACKGROUND AND JUSTIFICATION	3
1.2. POLITICAL DIMENSIONS OF DIETARY CHANGE AND LOWER MEAT CONSUMPTION	5
1.3. RESEARCH OBJECTIVE AND RESEARCH QUESTIONS	7
1.4. STRUCTURE OF THE THESIS.....	8
2. THEORETICAL APPROACH	9
2.1. WHY FOCUS ON MEAT CONSUMPTION	9
2.2. CONCEPTUALIZING POWER IN THE FOOD SYSTEM.....	10
2.3. FOOD REGIME THEORY AND HEGEMONY	10
2.4. THE ROLE OF MEAT IN THE FOOD REGIMES – THE HEGEMONY OF CHEAP MEAT	14
2.5. HOW A FOOD REGIME BECOMES HEGEMONIC AND THE ROLE OF THE NATION-STATE	15
2.6. CRITICAL STATE THEORY AS A FRAMEWORK FOR ANALYZING POWER RELATIONS	16
3. MATERIALS AND METHODS	21
3.1. LITERATURE RESEARCH.....	21
3.2. SEMI-STRUCTURED INTERVIEWS.....	22
3.2.1. <i>Identification of Actors and Interview Partners</i>	22
3.2.2. <i>Creation of the Interview Guide</i>	23
3.2.3. <i>Interview Process & Transcription</i>	24
3.3. METHODOLOGY FOR ANALYSIS	26
3.3.1. <i>Actors Strategies</i>	27
3.3.2. <i>Power Resources</i>	27
3.4. ABSTRACTION OF POLITICAL PROJECTS.....	28
4. ACCUMULATION AND REGULATION OF MEAT PRODUCTION AND CONSUMPTION IN AUSTRIA	30
4.1. MEAT PRODUCTION IN AUSTRIA	31

4.1.1.	<i>Structure of Animal and Meat Production</i>	32
4.1.2.	<i>Employment and Income in Austrian Meat Production</i>	36
4.1.3.	<i>Producer Prices and Margins</i>	38
4.2.	SLAUGHTERING AND PROCESSING	39
4.3.	SELF-SUFFICIENCY AND TRADE RELATIONS	39
4.4.	SALE AND COMMERCE	41
4.5.	CONSUMPTION OF MEAT IN AUSTRIA	42
4.6.	REGULATION OF MEAT PRODUCTION AND CONSUMPTION.....	44
4.6.1.	<i>Agricultural Policy within the European Union and Austria.....</i>	44
4.6.2.	<i>Producer Organizations and Price Negotiations</i>	47
4.6.3.	<i>Animal Welfare Policies.....</i>	47
4.6.4.	<i>Relevant Consumer Protection and Health Policies</i>	48
4.6.5.	<i>AMA Marketing and AMA Quality Seal.....</i>	49
5.	ACTORS, STRATEGIES, AND POWER IN AUSTRIAN MEAT POLITICS	51
5.1.	ACTORS THAT INFLUENCE MEAT CONSUMPTION.....	51
5.1.1.	<i>Industry Groups and Representation</i>	51
5.1.2.	<i>National State and International Entities</i>	54
5.1.3.	<i>Civil Society.....</i>	55
5.1.4.	<i>Media</i>	56
5.1.5.	<i>Consumers.....</i>	56
5.2.	ACTORS STRATEGIES AND RESOURCES – DESCRIPTION OF THE POLITICAL PROJECTS	57
5.2.1.	<i>The Dominant Political Project – Market Differentiation and Patriotism.....</i>	60
5.2.2.	<i>The Alternative Political project – Agricultural De-Intensification and Structural Reform.....</i>	69
5.2.3.	<i>The Incorporating Political project – Retail Integration and Consumerism.....</i>	76
6.	DISCUSSION AND CONCLUSION	80
6.1.	WAY FORWARD AND NICHES OF CHANGE.....	83
6.2.	REFLECTIONS ON THE RESEARCH AND ANALYSIS PROCESS AND FURTHER QUESTIONS.....	85
	LITERATURE CITED	87
	APPENDIX.....	96
	AFFIDAVIT	97

List of Figures

Figure 1: Relation of the livestock sector to the Sustainable Development Goals (SDGs).....	2
Figure 2: Research design and process	8
Figure 3: Framework for analysis of power relations	19
Figure 4: Own representation of structured content analysis	26
Figure 5: Development of gross own production in Austria for beef incl. veal, pork, and poultry meats.....	32
Figure 6: Development of livestock numbers and farms in Austria	33
Figure 7: Average number of animals per farm in Austria	34
Figure 8: Market share (%) of largest retail chains in Austria 2019 and 2020	41
Figure 9: Share of meat types in per capita meat consumption 2020	42
Figure 10: Development of domestic per capita meat use 1950-2010	43
Figure 11: AMA quality seal	49
Figure 12: Video campaign by AMAMarketing	66
Figure 13: AMAMarketing campaign from 2014	66

List of Tables

Table 1: Overview of interview partners and their institution	23
Table 2: Categories and Sub-Categories determined as actors' strategies	27
Table 3: Main categories for identification of power resources	28
Table 4: Summary of political projects' strategies and power resources	59

List of Abbreviations

AGES	Austrian Agency for Health and Food Safety
AMA	Agrarmarkt Austria
AoA	Agreement on Agriculture
APCC	Austrian Panel on Climate Change
BAB	Bundesanstalt für Agrarwirtschaft und Bergbauernfragen
BMK	Austrian Federal Ministry for Climate Action, Environment, Energy, Mobility, Innovation and Technology
BMLRT	Austrian Federal Ministry for Agriculture, Regions and Tourism
BMNT	Austrian Federal Ministry for Sustainability and Tourism
BMSGPK	Austrian Federal Ministry for Social Affairs, Health, Care and Consumer Protection
CAP	Common Agriculture Policy of the European Union
DG-Agri	Directorate General for Agriculture and Rural Development
DGE	German Society for Nutrition
ECDC	European Centre for Disease Prevention and Control
EFSA	European Food Safety Authority
EMA	European Medicines Agency
EU	European Union
FAO	United Nations Food and Agriculture Organization
GATT	General Agreement on Tariffs and Trade
GDP	Gross Domestic Product
GGÖ	Poultry Farming Cooperative
HiAP	Health in All Policies
IPCC	Intergovernmental Panel on Climate Change
NTÖ	Sustainable Husbandry Austria
OECD	Organisation of Economic Cooperation and Development
ÖGE	Austrian Society for Nutrition
ÖPUL	Austrian Program for Environment and Agriculture
ÖVP	Austrian Peoples Party
RQ	Research question
UN	United Nations
UNEP	United Nations Environment Programme
UniNetZ	Universities and Sustainable Development Goals
VAT	Value-added tax
VGT	Verein Gegen Tierfabriken (Association against animal farming)
VÖS	Association of Austrian Pork Farmers
WBAE	German Scientific Panel for Agricultural Politics, Nutrition, and Consumer Health Protection und der Federal Ministry of Food and Agriculture
WHO	World Health Organization

WKO	Austrian Chamber of Commerce
WTO	World Trade Organization
ZAG	Central Working Group of the Poultry Sector in Austria Geflügelwirtschaft Österreich

1. Introduction

Few foods are as prominently and emotionally discussed in high-income countries as meat. Austria is no exception. In 2019, the Viennese Schnitzel was medially declared a fundamental right by multiple Austrian parties following discussions about an increased value-added tax (VAT) on meat products in neighboring Germany (Konzett, 2019). The opposition party in Germany had demanded that the VAT on meat be raised to 19%, as is the case for other foods. While such a proposal was not brought forward in Austria, the preemptive defense blocked a possible discourse. In 2021, the annual Meat Symposium of the Agrarmarkt Austria (the national marketing agency for agricultural products) was held under the theme: *“get off the defensive”* (AMAMarketing, 2021, landing page, own translation). It focused on the growing social polarization of meat consumption, and how the industry can strengthen its position. These are only two examples of a growing conflict around the act of consuming and producing meat, which has entered the political sphere.

While food consumption is often portrayed as a private matter, the increasing impacts of production systems on global commons have moved diets centrally into the public discourse. Animal products and meat play an important role in converting indigestible plant matter into nutrients available for human uptake and as such are a central part of the agricultural system. Yet, in many high-income countries, the high levels of consumption have become costly. The global food system is estimated to account for 25-30% of anthropogenic greenhouse gas emissions mainly from food production and land use change related to production systems (Clark et al., 2020; Intergovernmental Panel on Climate Change (IPCC), 2019). Further ecological costs of the current food system include the loss of natural ecosystems, declining biodiversity, and a large proportion of global freshwater use (Intergovernmental Panel on Climate Change (IPCC), 2019).

Sustainable agriculture and livestock systems can on the other hand also play an important role in the mitigation of climate change (Clark et al., 2020; Rao et al., 2015). Mehrabi et al. (2020)

stress the complexity embedded in the interactions of the livestock sector with sustainable development globally. They determine that the livestock sector impacts at least 10 of the 17 SDGs, where over 8% of targets concerning human and environmental health are negatively affected, while 3% of the targets in the areas of poverty reduction, inequality, and rural infrastructure may be affected positively (Figure 1).

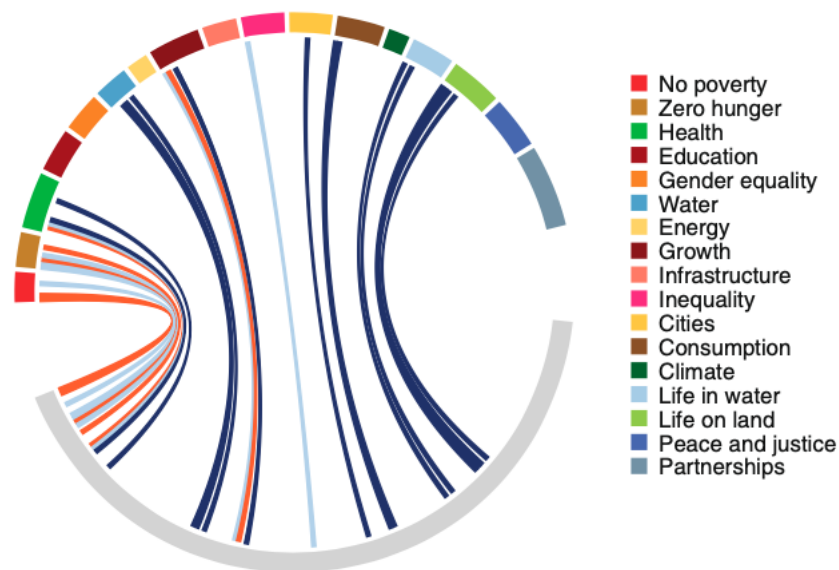


Figure 1: Relation of the livestock sector to the Sustainable Development Goals (SDGs). Orange lines indicate positive impacts, dark blue lines are negative impacts and light blue indicates mixed impacts. The width of the colored SDG bars indicates the number of targets (Mehrabi et al., 2020)

Dietary change, in particular reducing meat consumption where it is too high, is seen as an important lever for achieving the global emissions reduction targets (Clark et al., 2020; IPCC, 2019; Theurl et al., 2020), the Sustainable Development Goals (Hundscheid et al., 2021; IPCC, 2019; Mehrabi et al., 2020) and public health objectives (Mehrabi et al., 2020; Westhoek et al., 2014; Willett et al., 2019). Yet, to reduce external costs, lower consumption must also lead to lower levels of production underlining the necessity for actions on multiple levels (Roux et al., 2022; Trewern et al., 2022). Additionally, meat consumption and production is a highly contested field, where transformation may be the most challenging (Pushkarev, 2021).

In 2021, the UniNEtZ (Universities and Sustainable Development Goals) project formulated key options for achieving the SDGs in Austria. The leading option concerning SDG 2 - No Hunger and

Sustainable Agriculture, was a reduction of meat consumption and a transition to increase consumption of plant-based proteins in Austria (Hundscheid et al., 2021). In a corresponding Master thesis by Daniela Bergthaler, national policies for realizing this green protein transition were compiled and analyzed. The results showed, that while Germany, the Netherlands, and Sweden have taken first steps to shift dietary patterns, in Austria no national policy options were identified that aimed to reduce meat consumption (Bergthaler, 2021). These findings raised the questions of why this is the case, and what may be preventing initiatives to change in Austria. This thesis aims to shed light on how and by whom the field of meat consumption is contested in Austria. The thesis offers an analysis grounded in political ecology, looking at the socio-political dynamics involved in the governance of meat production and consumption – the meat politics. Centrally the thesis analyzes the actors involved, their strategies, and available power resources.

1.1. Scientific Background and Justification

Livestock production is a major driver of agricultural biomass production. Krausmann et al. (2008) calculate that the European livestock system uses more than 80% of all agricultural biomass. Animal production systems also encompass 70% of agricultural land use, including arable cropland and pasture for grazing (Van Zanten et al., 2018). Furthermore, approximately 14.5% of global GHG emissions are attributed to livestock (Gerber et al., 2013). Meat products, most importantly beef, comprise the largest proportion of this making up 41% while pork and poultry amount to 9% and 8% respectively (Gerber et al., 2013; Godfray et al., 2018).

Beyond environmental costs, the high levels of meat consumption and production have also been shown to take an increasing toll on public and private health. Boyd Swinburn (2019) calls the synergy of pandemics – obesity, undernutrition, and climate change – a Global Syndemic. The overconsumption of red and processed meats, as is prevalent in many high-income countries, has been found to be associated with an increased risk of non-communicable diseases. In 2015, this led the WHO to classify processed meat (salted, cured, fermented or smoked) as carcinogenic and red meat (beef, veal, pork, lamb, mutton, horse, and goat) as probably

carcinogenic (International Agency for Research on Cancer (IARC), 2015). Other studies have found it to be directly associated with obesity (Rouhani et al., 2014).

Animal welfare has also become a growing concern for many critics of contemporary production systems where animals are largely seen as commodities (Neo & Emel, 2018). Animals have over years been bred for optimal adaptation to highly specialized and technified production systems, with the goal of maximizing profits and oriented towards the exchange value rather than the human use (Gunderson, 2013). Animal health concerns have frequently been met with new technological solutions resulting in an increased use of antibiotics to prevent disease in high-density animal populations. The dependence on antimicrobials in some livestock farming systems was analyzed by the European Food Safety Authority (EFSA) and the European Medicine Authority (EMA), leading them to conclude that these are reliant on routine use so much, that the systems would not be sustainable without antimicrobials (EFSA & EMA, 2017). The European Centre for Disease Prevention and Control (ECDC) and the Organisation for Economic Cooperation and Development (OECD) estimate that in the EU and EEA, 1.1. billion euros annually will be spent between 2015 and 2050 due to anti-microbial resistance, if the projected trend in use continues (ECDC & OECD, 2019). The repeated and prophylactic use of antimicrobials was forbidden with new EU Regulation adopted in 2018, the implementation began in February 2022 (Nunan, 2022). Intensive meat production systems are also associated with an increased risk of zoonotic diseases such as H1N1 influenza or others (United Nations Environment Programme (UNEP), 2020).

While niches have formed around vegan/vegetarian diets and meat alternatives, overall meat consumption in high-income countries remains high. More precisely, the average Austrian consumes 60.5kg of meat annually (AMAIinfo, 2021b). This is nearly three times the amount recommended by the Austrian Society for Nutrition (ÖGE), which recommends a consumption of 22kg per capita (Österreichische Agentur für Gesundheit und Ernährungssicherheit (AGES), 2022), among others (Deutsche Gesellschaft für Ernährung (DGE), 2017; Willett et al., 2019; World Health Organization (WHO), 2019). Despite meat being a central part of Austria's food

culture, the level of consumption has not always been so high. The shift of meat consumption from a matter of privilege, reserved for the wealthy, to being affordable and frequently available for the masses, was also considered the *democratization* of meat (Knapp, 1997). This referred to a change in attitudes where social disparity in the consumption of meat was no longer considered a normality but a form of deprivation from healthy diets (ibid.). Since 1950, meat consumption has doubled, coinciding with high levels of economic growth, increasingly industrialized agriculture, and a flourishing middle-class (Willerstorfer, 2013). Many studies show a correlation between increasing income through economic growth and animal protein consumption. Globally meat consumption has more than quadrupled since 1961 amounting to 340 million tons annually in 2019 (Ritchie et al., 2019). Additionally, global meat consumption has increased on average by 20kg per capita since 1961 (ibid.). In their Agricultural Outlook report, the OECD and FAO predict that meat consumption will increase by an additional 14% by 2030, compared to the 2018-2020 base period, driven largely by income and population growth (OECD/FAO, 2021).

These predictions follow the paradigm, that increasing income and affluence also lead to higher consumer demand for animal-based foods (Godfray et al., 2018). While this paradigm sees dietary change as mainly driven by economic development, it neglects the structures, institutions, and politics that surround this change process. Looking at food system transformation, Baker et al. (2021) claim that the necessary food systems transformation can and will not be achieved without scrutiny and a better understanding of the underlying political economy driving the system. This requires an approach that looks at the actors, interests, structures, and power as explanatory variables for understanding today's food challenges. As food systems are embedded in national, local, and cultural contexts, the diverse regional food systems may also have diverse political economies, making a look at diverse contexts more important (ibid.).

1.2. Political Dimensions of Dietary Change and Lower Meat Consumption

A shift towards lower meat consumption requires a food environment and social structures that are conducive to dietary change. Dixon (2009) portrays how dietary changes in the past, have not

occurred spontaneously but have been accompanied and, as she argues, driven, by changes in governance, institutions, and economic incentives. Increasingly calls have become louder arguing for governments to take a more leading role in enabling sustainable changes in dietary behavior. Wellesley et al. (2015) find that there is a strong case for government intervention in sustainable diets, including lower levels of meat consumption, as these resonate highly with further policy aims such as reducing emissions and health care costs. However, they argue that governments have shied away from tackling this challenge, favoring supply-side adaptations such as reducing emissions in agricultural and livestock production. Additionally, they state that government inaction has resulted in a cycle of inertia where inaction leads to a lack of public awareness, which lowers policy priority, again furthering inaction. While this study done in 2015 concluded that interventions in meat and dairy consumption were '*virtually non-existent*' (Wellesley et al., 2015, p. 9), in 2021, Bergthaler (2021) found that public policies to influence meat consumption in high-income countries have still remained sparse.

Looking at Germany, the Netherlands, and Sweden, Daniela Bergthaler found that all three countries had implemented measures in the field of education and information. Only Sweden and the Netherlands were identified to have made changes to the product selection and measures for financial incentives to change consumption were only discussed in the Netherlands. No country had implemented commandments or prohibitions concerning meat consumption (Bergthaler, 2021).

The Austrian Panel on Climate Change (APCC) highlights that it may take more than soft measures, such as consumer information, typically preferred by government to achieve the possible co-benefits of reduced meat consumption (APCC, 2018). Also, the German Scientific Panel for Agricultural Politics, Nutrition, and Consumer Health Protection und der Federal Ministry of Food and Agriculture (WBAE) highlights that too much weight is given to individual consumers regarding public food policy aims (WBAE, 2020). Both panels point to the difficulty of implementing measures for change caused on the one hand by the perception that nutrition-

related problems are not perceived to be a social challenge and secondly due to opposition by powerful actors within the system (APCC, 2018; WBAE, 2020).

Sievert et al. (2020) also highlight the challenge of system-wide action on meat reduction due to the presence of powerful actors as well as the discursive and institutional framework that shapes food policy priorities. Swinburn (2019) also calls attention to the importance of looking at power dynamics in food systems and especially the role of governance as a location where these dynamics become most evident. Swinburn also claims there is a policy inertia regarding actions that are necessary to improve the food system and address the Global Syndemic (the parallel pandemics of obesity, undernutrition, and climate change). This inertia is due to i) opposition from food industries, ii) reluctance of politicians to tax and regulate and iii) Lack of demand for policy action from civil society. The implementation of sustainable dietary guidelines and the reduction of red meat consumption are identified as triple-duty actions, which produce benefits in all three pandemics (Swinburn, 2019).

1.3. Research Objective and Research Questions

Given the social and political challenge of addressing the high level of meat consumption, this analysis aims to contribute to our understanding of the political structures upholding high meat consumption in Austria and the barriers to change. The purpose is to take a closer look at the roles of different actors in Austria and how these can universalize their interests in the state to enact change or protect their dominant position. The research questions (RQ) are the following:

RQ 1:

- What actors influence meat consumption in Austria?
- What visions and strategies do these actors follow?
- What resources are available and used by the actors to exert influence?

RQ 2:

- How are these strategies materialized in Austrian food policies related to meat consumption?

To answer these questions, an analysis, theoretically grounded in Food Regime Theory and Critical State Theory was conducted. To begin, in-depth research of the national context of meat consumption and production was conducted. The analysis is based on 13 qualitative interviews conducted by the author which are complemented with additional, publicly available, materials. The research process is indicated in Figure 2 below.

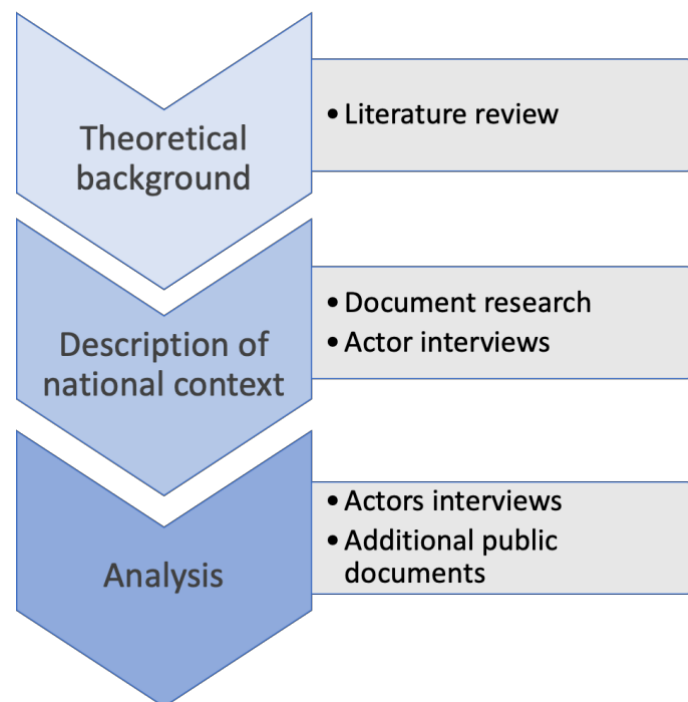


Figure 2: Research design and process (own representation)

1.4. Structure of the Thesis

The thesis is structured along the research process. First, the theoretical approach and background are described. Subsequently, the materials and methodology are explained for the literature review, document search, and interview process. Here the categories for the analysis are also described. In chapter 4 the national context of meat production and consumption is described to provide the basis for the analysis of actors and power relations. The results of the analysis concerning actors, strategies, and power resources are outlined in chapter 5. The

discussion and conclusions offer a contextualization regarding similar works and Food Regime Theory, while also indicating possible niches for change.

2. Theoretical Approach

To approach power relations in a food system and a national context, a wider perspective on the role of food and agriculture in society is considered. The theoretical foundations lie in Food Regime Theory with a focus on hegemony and political dynamics on a national level.

2.1. Why Focus on Meat Consumption

Central to the theoretical approach used for the analysis is the close interrelation between patterns of production and consumption. The term consumption was chosen in the conceptualization of the research question as it represents a key area of socio-political conflict. Using meat consumption as an entry point, the aim is to move beyond the consumption-production dichotomy to consider the complex political processes that enable and support the high level of meat consumption in high-income countries and increasingly in low- and middle-income countries. This approach also challenges the hegemonic use of discourse separating the two spheres, this separation is inherently conflictual and an *“artifact of power and socio-cultural as well as ideological construction”* (Gouveia & Juska, 2002, p. 372). The focus on consumption as driving production methods and the narrative of consumer sovereignty is therefore considered a manifestation of unequal power relations. Neo and Emel (2018) also describe consumption as a collective act, mediated through politics:

“consumer sovereignty is already something of an illusion because consumption is always a collective endeavor. Meat eating is not an individual action alone but is mediated through historical and cultural politics. [...] Consumption choice is thus not based on knowledge or desire alone but is always a collective action dependent on choice-sets and information made available through a variety of institutional actors.” (Neo & Emel, 2018, p. 78)

2.2. Conceptualizing Power in the Food System

Power refers to the ability to act in a particular way or to do something. Political ecologists understand power in the ability of actors to control their own interaction and that of other actors with the surrounding environment (Bryant & Bailey, 1997). In this sense, they see power and the relations between the power of different actors as determining human-environmental interactions (idib.). Looking at power in the food system, with its complex network of actors and structures of interaction, requires a systems approach to power. Gaventa (2009), therefore proposes that power can be exerted by single actors within the system, but also hidden as properties of the system itself. He further describes power as occurring at different levels (local, national, global), allowing for different spaces of participation, and taking on different forms from visible, hidden, or invisible. When power is not only exerted by actors but embedded in the system itself, this means that powerful actors, that can form the system, are also able to create space that benefits their position. The International Panel of Experts on Sustainable Food Systems (IPES-Food) also points to this reinforcing property within food systems arguing that food systems analysis must move away from the dichotomy between holders of economic and political power towards a relational lens. Taking a food system and relational power approach allows us to *“capture the webs of self-reinforcing power and influence that create systemic dynamics and systemic lock-ins”* (International Panel of Experts on Sustainable Food Systems (IPES), 2015, p. 6). The different forms of power used in the analysis are described further below.

2.3. Food Regime Theory and Hegemony

Food Regime Theory provides a perspective on looking at general patterns within the food system, and how these are related to power. The concept of ‘Food Regimes’ coined by Friedmann and McMichael (1989), links prevalent modes of agricultural production and consumption to periods of capitalist accumulation (Friedmann & McMichael, 1989). The aim was to explore *“the role of agriculture in the development of the capitalist world economy, and in the trajectory of the state system”* (Friedmann & McMichael, 1989, p. 93). Beginning in the 1870s, they traced transformations in agricultural production and consumption in the context of world systems and international power relations. Thus, they created a link between geo-political developments and

patterns in agriculture, where food production and consumption (where, what, by whom, and for whom) became closely linked to global development dynamics. Since its first conceptualization, the concept of food regimes has been expanded and applied to a multitude of contexts (McMichael, 2009).

Friedmann (2009) specified that “*regime means regulation*” (Friedmann, 2009, p. 335). Understanding a Regime as a set of implicit or explicit rules, regulations, norms, and institutions that are stabilized, allows for a closer examination of these rules related on the one hand to state regulation and to hegemony. Hegemony here refers to the Gramscian dynamics of consent and coercion, which stabilize social, economic, and political systems, making them resilient towards internal contradictions (Brown, 2020). Food Regime analysis examines the political dimensions of food, removing it from the idea that the agrarian system is driven by individual consumption decisions and purchasing power, rather laying the focus on power relations and hegemonic political-economic systems competing within the (national and international) state system (McMichael, 2021). Food, therefore, becomes an inherently *political* matter.

In the first formulation, two Food Regimes were identified. Within each, the circulation and organization of food underpinned the dominant state's expansion of power concerning markets and ideology (McMichael, 2009). The first, a period of free trade and UK hegemony between the 1870s and WWI was characterized by imports of tropical foods and staple crops from colonies to a growing European industrial class. Imports of staple crops and meat served the interest of industrialization as they enabled cheap food for industrial workers, lowering the potential of revolt and allowing for low wages (Ermann et al., 2018). The high level of imports created pressure from coalitions of landowners, industrial capital, and farmer representatives who were concerned about national food security in case of conflict and revolution of industrial workers (ibid.).

The second, US-centered food regime was formed after the recession and WWII. With high levels of national subsidies (first in the USA and later through the Common Agricultural Policy in Europe)

to boost national production. Coupled with productivity gains through the Green Revolution, surplus crop production shifted to the Global North (McMichael, 2009). In Europe, recovering from WWII, agricultural production quickly increased, reaching post-war levels in 1950 and increasingly relying on inputs from outside the farm (feed, seeds, fertilizer) to support production levels (Segers et al., 2021). The increasing specialization and input reliance also furthered the transition to larger, more profitable farms (ibid.).

Profit from surplus production was ensured through the creation of additional demand and export subsidies to countries of the Global South (Ermann et al., 2018). Food Aid was accompanied by the promotion of agribusiness and western diets around the world (McMichael, 2005). With the exclusion of agriculture from the GATT (General Agreement on Trade and Tariffs), countries in the north were able to hold on to their protectionist support measures in agriculture while exporting surpluses (Langthaler, 2016). Another effective method for using the excess crop was a further expansion of industrial livestock and meat production. This expansion was assisted by the intensification of agricultural specialization with a dominance of large industrial capitals and increased production of agricultural products and industrial inputs, rather than food (Friedmann & McMichael, 1989). Newly specialized agricultural sectors included large areas being used for feed crops (soy, maize) and an increasing number of farms only producing livestock (ibid.). Beef became the center of the post-war diet, and meat consumption increased by 50% after 1950 (Friedmann & McMichael, 1989; Willerstorfer, 2013). Livestock production, its inputs, and processing consequently became increasingly corporate mirroring the growing power of transnational companies and agribusiness that characterized the second food regime (Bernstein, 2015).

The dominance of transnational corporations and increasingly industrialized agriculture using globalized markets to produce *food from nowhere* (McMichael, 2005) has made the survival of small-scale farmers in the North and in the South increasingly difficult (McMichael, 2021; Plank et al., 2020). Since the beginning of the 1950s, the number of small-scale farmers in Austria (producing on an area under 20ha and a monetary value below 15,000 euros/annually) has

reduced by 62%. In 2016, they comprised only 8% of the agricultural area in Austria (Groier et al., 2018).

McMichael (2012) also postulates a current third, Corporate Food Regime characterized by neoliberal globalization which expands the transformation of agriculture around the world to feed an increasingly affluent consumer-class (McMichael, 2005). Under the narrative of feeding the world, agricultural markets were increasingly commodified and liberalized accompanied by increasing financialization and agribusiness conglomeration (McMichael, 2021). Friedmann (2005) adds to this by describing the emergence of a corporate-environmental food regime, where demands of consumers and social movements are increasingly leading to new methods of re-embedding food systems into local and ecological systems. Increasingly this is being appropriated by large agri-food and retail corporations into a form of *green capitalism* (Friedmann, 2005).

A pattern throughout the food regimes is their reliance on the cultural framing of cheap food (Campbell, 2009). McMichael (2021) highlights the centrality of world food prices as steering the production and circulation of food. The cheapening of food is a political-economic process with an “*important pacifying effect*” (Brown, 2020, p. 189), enabling capital accumulation through a better wage/food price ratio and enlarged profits in successive steps of processing and retail while providing social order and political stability (Brown, 2020). While the first two food regimes were dominated by geo-political powers, the UK and the USA creating structures that enabled cheap food for an increasingly wealthy population, today the dominant geo-political order can be considered neoliberal with a liberalization of global trade rules and an expansion of export agriculture in the name of feeding the world (McMichael, 2021). On the one hand, this has enabled the consumption of high-value goods at low prices around the world, it has also resulted in the mass production of standardized agricultural products or commodities (Sage, 2013). Consequently, food prices are kept low but highly volatile as markets cope with varying conditions and conflicts around the world and liberalization has opened food commodities to speculation.

2.4. The Role of Meat in the Food Regimes – The Hegemony of Cheap Meat

The production and consumption of meat played a key role in the stabilization and de-stabilization of the food regimes. In the first food regime the import of wheat and meat, produced by large-scale settler production in colonial states, were the dietary staples of the European working class in the industrial centers of the north (Friedmann & McMichael, 1989). By shifting intensive production to settler states, colonial powers were able to bypass natural limits constraining accumulation, such as land availability allowing for cheaper production of agricultural commodities (idib.). Dixon (2009) also highlights the growing interest of nutritional science in meat consumption during the first Food Regime. She uses the example of the nutritionist Wilber Atwater, who recommended higher intakes of protein and fat, especially through cheap cuts of meat and fatty meats to increase the productivity of American workers. The quantification of dietary value in the form of calories and protein played a central role in positioning animal foods as the “*master nutrient*” (idib, p. 325) and in legitimizing import-export complexes (Dixon, 2009).

In the second food regime, with the intensification and industrialization of the agricultural sector, the intensive meat complex became an effective tool for creating additional value from the specialized and surplus production of grain (Weis, 2021). With the implementation of the Marshall plan, the USA provided large amounts of aid for the agricultural sector to European countries. With these flows of fertilizer and feedstuffs, along with direct investments by US transnational agri-food corporations, post-war agricultural production in Europe was reconstructed following the US example. This restructuring included the promotion of meat-intensive diets and intensive livestock production (Friedmann, 1993; Langthaler, 2015). *Beefing up* increasingly became the form of modernity that was presented in the second food regime (Rifkin, 1992 in McMichael, 2005), and it still remains today with livestock and meat production still being presented as a pathway out of poverty (Lundström, 2019) and a symbol of increasing welfare. In the corporate and liberalized food regime, the rise of New Agricultural Countries and trade liberalization drastically increased the level of trade with feed and meat (Langthaler, 2016).

Europe became a meat exporter in the 1980s, heavily reliant on imported feedstuffs (European Environment Agency, 2020; Roux et al., 2022).

Tony Weis (2021) describes the shift of meat from the periphery to the center of diets as a *meatification* (Weis, 2021). He argues that intensive meat production allowed for profitable use of surplus crops from industrial monocultures as the sale of meat, eggs, and dairy allowed for higher prices due to the perceptual value that was attached to the products. Consequently, the livestock sector allowed for the development of additional, highly profitable input and processing sectors (idib.). Weis also highlights that this *meatification* is mainly driven by increases in pork and poultry production. While cattle comprised the largest proportion of global production (approx. 40%) in 1961, in 2013 pork and poultry made up over 70% as a result of their more efficient feed-to-flesh conversion ratios (Weis, 2013). Central to the expansion of meat consumption is the ideological and spatial division of animals as livestock from humans and an increasing commodification (Lundström, 2019). Yet increasing awareness of resource appropriation linked to livestock production has exposed an inherent conflict within the regime resting upon this manufactured division. Calls from various sides of the spectrum for increased appreciation for animal products, increased animal welfare, and relocalization of food systems stand in stark contrast to the predominant modes of production and the persistent high consumption levels. This raises the question of how the dominant regime remains resilient and how the hegemony of cheap meat production is stabilized.

2.5. How a Food Regime Becomes Hegemonic and the Role of the Nation-State

While Food Regime analysis stems from a world-historical perspective, considering global political development, actions at the local and national levels contribute to sustaining their resilience. Increasingly scholars have called for a relocalization and a downscaling of the approach to better understand how food regimes are regulated and contested (Jakobsen, 2021). Local actors are involved in maintaining or challenging the hegemonic forces (Brown, 2020). Therefore, the resilience of a Food Regime is dependent on the national setting where actions of consent and coercion by the nationally dominant classes coupled with legislative and coercive powers of

nation-states result in national policies that define rules and regulation. The transnational Food Regime only becomes powerful when national and local dominant classes succeed in positioning it in the nation-states (ibid.).

Concerning the corporate food system, which relies heavily on deregulation and privatization, McMichael (2013) argues that following the neoliberal doctrine, the market is elevated over the state which serves to accommodate transnational capital. Scholars have criticized this notion highlighting that it is exactly this form of *neoregulation* by the state that enables market-orientation (Otero, 2018). The state, therefore, becomes central to the institutionalization of food regimes (Jakobsen, 2021). The analysis of political projects within a nation-state can serve to gain insight into how local actors and alliances create consent and exercise power in the national accumulation regime embedded within global relations.

2.6. Critical State Theory as a Framework for Analyzing Power Relations

Critical state theory sees the state as central to the organization of capitalist relations (Jessop, 1990). In this understanding, the state is a materialized social relation – the location and result of power struggles between different actors, following strategies corresponding to their economic development models (Buckel et al., 2014; Jessop, 1990). The state, along with its institutions, norms, policies, and specific regulations is hence the result of hegemony projects competing for influence. Political projects, based on the concept of hegemony projects, can be summarized as bundles of relatively coherent strategies in a certain field of politics, which compete to universalize their interests within the state (Pichler & Ingalls, 2021). Universalization can result in particular interests and ideas becoming the state, and public policy (Brand, 2013). Following this approach, the state no longer remains a neutral apparatus for organizing public life but an institutional ensemble that, as a result of the social power struggles within, has a structural selectivity for hegemonic forces (Poulantzas, 1978 in Jessop, 1990). While actors compete for influence with varying degrees of power, the structural selectivity represents power within the system itself (see Gaventa, 2006; IPES, 2015) and serves to reinforce the position of dominant actors. Hegemonic forces here are differentiated from those that are competing for

hegemony in the sense that the latter have not yet been 'successful' in becoming hegemonic (Buckel et al., 2014). Critical state analysis, therefore, offers a framework for developing an understanding of power relations that influence if, and how, governance is understood and implemented in public policy fields.

Political projects within this analysis are based on the concept of hegemony projects (Buckel et al., 2014; Jessop, 1990). A political project represents a union/coalition of actors with similar understandings of a given conflict, linking the conflict to political and economic processes (Pichler, 2014). While there is a myriad of individual interests and strategies, the role of a hegemonic project is to abstract and generalize individual interests to mobilize support behind a concrete program that advances the interest of the hegemonic class (Jessop, 1990). Only through generalization and coalition-building, do perceived conflicts enter into the political sphere (Pichler, 2014). For the analysis and differentiation between these social forces, political projects are used as an abstraction of relatively coherent strategies (Buckel et al., 2014). Rather than grouping actors based on their position within social institutions, the projects are formed around similar strategies, that can refer to or complement each other but may also not consider themselves in an alliance. The main criteria for the assignment to a certain political project, are corresponding strategies in the conflict of interest (ibid.). This should not suggest, that there is one uniform strategy across actors within a project, rather there may be several strategies within and varying tactics concerning the strategies (Jessop, 1990). To be considered a coherent project, dominant actors in the project must succeed in aligning these strategies through discourse and compromise (Buckel et al., 2014). Hegemony can thus not be considered static but must be seen as constantly constructed and reconstructed (ibid.).

The strategies of actors refer to the desired actions to be taken for a certain aim and are formed based on their understanding of the problem and conflict at hand, as well as their vision of desired futures (Buckel et al., 2014). They thus involve concrete measures that the actors deem necessary or effective in reaching their desired outcome or vision of the future state. Critical State Theory differentiates between accumulation strategies and state strategies. Accumulation

strategies refer to a specific economic growth model, along with its necessary preconditions (Jessop, 1990). Accumulation strategies entail the prioritization of sectors and actors' interests thus forming the economic basis of the political project (Pichler & Ingalls, 2021). State strategies refer to the policies, rules, norms, and regulations which are deemed to be conducive and necessary for the desired model of economic growth (Pichler & Ingalls, 2021). With their state strategies, actors are promoting a form of intervention into the economy that supports their economic model (articulated in their accumulation strategy), while also ensuring the creation of institutions that enable access to political and economic power (ibid.). The materialization of actors' strategies, results in a structural selectivity, making the terrain more conducive to those actors' future strategies (Pichler, 2015). This can involve forms of representation, political access, or particular interventions that provide power to and benefit the hegemonic class (Jessop, 1990).

Following the Gramscian understanding of the integral state being political society (ministries, state institutions) and civil society (media, political parties, social movements), actors within the political projects can come from both spheres. Rather than seeing civil society as existing outside of the state, it is an integral part, playing a central role in legitimizing and challenging what is considered the general interest (Ford & Newell, 2021; Forgacs, 2000). Civil society actors can play a role in supporting the group of actors in hegemonic position or introducing alternative pathways. Regarding Food Regime analysis, Friedmann points out that social movements play a key role in legitimizing or challenging the predominant food relations (Friedmann, 2005 from Campbell, 2009).

Figure 3 illustrates the theoretical framework used for analyzing power relations upon and within the state. Embedded within a global regime with rules, institutions and implicit forms of regulation, multiple political projects with corresponding accumulation and state strategies may be present for a given conflict. Which project can universalize its interest and become hegemonic on the national level, depends on the power resources available. Political projects may be proposing changes to the dominant regime, while others, consisting of incumbent actors, are following a strategy of resistance, using their power resources to remain in the hegemonic

position (Ford & Newell, 2021). The success of actors and projects on a national level serves to strengthen or challenge the global regime (see chapter 2.5).

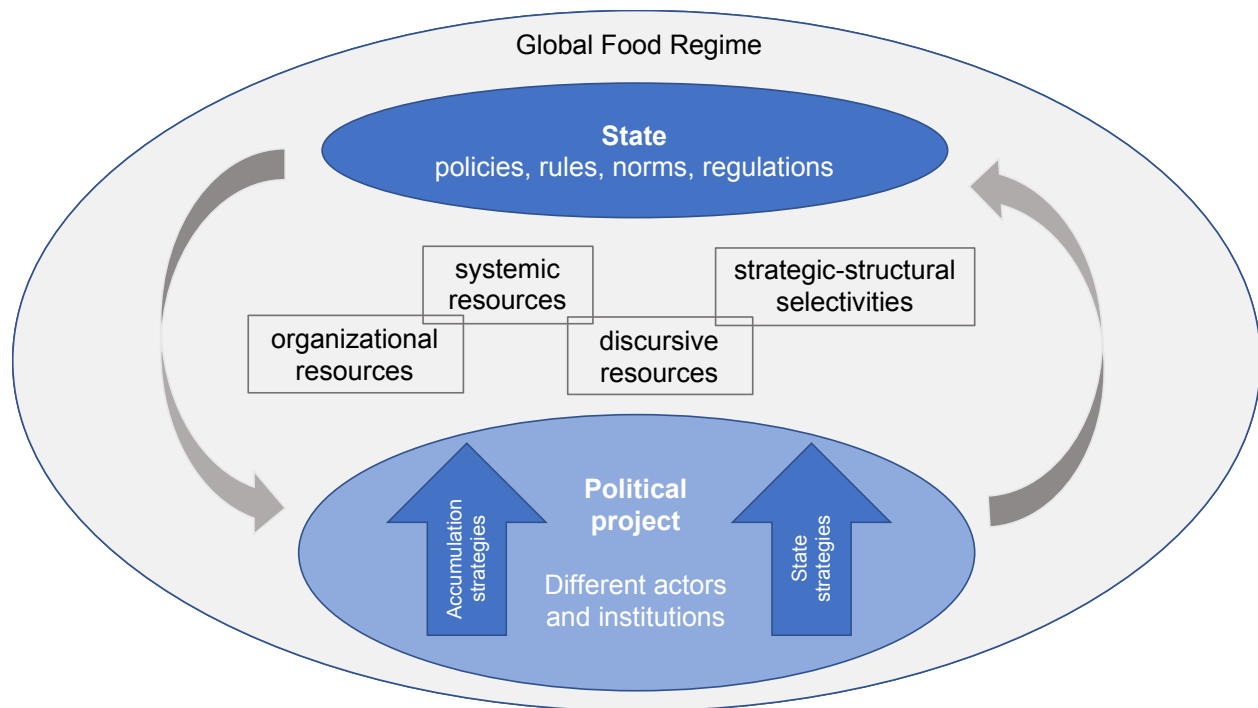


Figure 3: Framework for analysis of power relations (own representation based on Pichler and Ingalls (2021) and Buckel et al. (2014))

Power resources can take many forms. For the purpose of this analysis, power resources were categorized into four types following Buckel et al. (2014). Organizational power resources refer to qualities of the actors themselves and can include financial resources, human resources (personnel and knowledge) as well as networks and connections to other actors or knowledge of the system. The ability of actors to make system-relevant decisions such as providing or removing finances or labor are summarized under systemic resources. Actors can mobilize discursive resources by aligning their strategies with public discourse, using recognizable symbols, and appealing to ideologies. The above-mentioned power within the system is summarized under strategic-structural selectivities which represent the path dependency of the state as a result of historical conflicts. Actors can wield power from these selectivities when their strategies and aims are aligned with structures that are already in place (Buckel et al., 2014), these may be at local, national or international level. Various forms of power can overlap and interact, making the classification of different types of power resources a simplifying heuristic (c.f. Baker & Demaio, 2019). The power of actors and success of hegemony projects is a result of the available resources

but also how actors combine these resources in the socio-economic context and build on existing path dependencies.

3. Materials and Methods

In order to answer the research questions, a literature and document research was complemented with semi-structured interviews. Information about the current accumulation regime and the mode of regulation was gained from the document analysis and interviews. I applied a qualitative content analysis to the documents and transcribed interviews to analyze actors' strategies and resources.

3.1. Literature Research

An in-depth literature search was used to build the theoretical basis of the analysis. For this academic literature was found in the fields of political ecology and economy of food systems and the meat sector was collected. This was complemented by a deeper focus on power and power relations in food systems. Additionally, academic literature on Food Regime Theory and Critical State Theory as well as approaches to using these as a lens for analysis was found. The search for academic literature was completed using the university library portal and google scholar.

For the Austrian context, academic and grey literature was found on agricultural development, regulation, and politics. This was done using the named portals for academic literature, while also expanding the search to the google general search engine for sources not published in the academic sphere. The description of the accumulation regime was completed using publicly available reports by ministries (particularly the agricultural ministry, BMLRT), the national statistical bureau (Statistik Austria), as well as EU statistical databases.

Additional documents for the qualitative analysis were found by searching publicly available databases. These documents included, press statements, parliamentary materials, or publicly available interviews in media. These were found by searching for statements by actors already identified and by researching past policy debates. The additional documents were analyzed using the same approach as the interviews and served to complement statements made in the interviews.

3.2. Semi-structured Interviews

A total of 13 interviews were conducted with 14 persons identified through purposeful sampling in the time between February and April 2022. The interviews were the central materials used for my analysis of the actors' strategies and power resources.

3.2.1. Identification of Actors and Interview Partners

Actors, that influence and act upon meat consumption in Austria were initially identified by scanning news and media outlets. Using recent policy discussions about meat consumption and proposals for policy changes, organized actors that made statements on these were identified. Political actors in this context were considered to be representatives of organized and grouped actors (e.g. institutions, parties, corporations, or organizations) and not individuals (Flick, 2014). Of interest was their knowledge and perspective as representatives of the corresponding group, not as an individual.

An initial list of relevant actors was created, with the actors identified from publicly available policy discourse and expanded with the expertise of the field within the UniNetz SDG 2 team. A central aim was to ensure the balance between the different types and interests of actors. By considering the value chain of meat production and the policy process, actors from different stages were included (production, processing, retail, state institutions, and civil society).

After identifying key actors using a media scan and expanding this with feedback from within the UniNetz team, the next step was to identify relevant representatives for the interviews. Relevant representatives were found by researching the organizational structure of identified institutions. Persons responsible for the areas of meat consumption, production, agricultural policies, health policies, and nutrition were identified. Additionally, the press statements and media articles could also be used to see, what members made statements or offered quotes on the topic. All interviewed actors were also asked, which other actors they consider to be relevant to the topic. These replies from actors knowledgeable in the field were important to ensure no important

actors, that may not be as involved in the public discourse and hence not present in media, were missed in the research. Table 1 summarizes the interviews. One contacted interviewee suggested the participation of an additional person, this resulted in a total of 14 interviewees. A balance of gender perspectives did not play a role in the selection of interview partners, 5 of the interviewees were female and 9 were male.

Table 1: Overview of interview partners and their institution

ID		Institution	
I1	Science	Key informant and expert in organic farming practices	M
I2	Civil Society	Representative of a civil society initiative	M
I3	Civil Society	Representative of an international farmers organization	M
I4	Civil Society	Representative from national animal welfare and animal rights NGO	M
I5	Civil Society	Representative of international environmental NGO	F
I6	Civil Society	Representative of a national labor and consumer protection union	F
I7	Government Entity	Head of a national consultative group for nutrition	F
I8	Production	Representative of national agricultural marketing agency	M&F
I9	Production	Representative of Austrian Chamber of Agriculture	M
I10	Production	Representative of national pork industry	M
I11	Production	Representative of national poultry industry	M
I12	Industry	Representative of the Chamber of Commerce / Food Industry Association	M
I13	Retail	Speaker of a food retailer	F

3.2.2. Creation of the Interview Guide

An interview guide was created with the central questions that were addressed to all actors (Gläser & Laudel, 2010). The interview questions were created based on three key topics and knowledge aims. These were formulated according to the research questions but also aimed at expanding the understanding of the accumulation regime and the mode of regulation. The key topics for the interviews and the desired knowledge gains were identified to be:

- 1) Vision and perception of the actor regarding meat consumption in Austria
 - ⇒ Insights into actors' perspectives, strategies, and intentions
- 2) Accumulation Regime and Mode of Regulation

- ⇒ Insights into actors' perspective of current accumulation and regulation, supplement to literature research
- 3) Participation of actors in political processes
 - ⇒ Insight into current political processes, further actors that are relevant, alliances between actors, and resources that are available and used.

The central interview questions were formulated along these topics. Slight adaptations to the central questions were undertaken after the first few interviews where it became clear that the formulation could be refined. Further questions for the expansion of the replies were prepared for each interview before. The integration of a specific policy example, where it was known that the respective actor had made a statement, enabled a more in-depth and concrete response, especially concerning the policy process. This was only done following the open question in the guideline, to prevent steering the responses in a certain direction. The final question was left as an opportunity for the interviewee partner to add any additional topics or comments that perhaps were not mentioned previously. Additionally, space was left to address questions to me, if desired. If requested by the interview partners, the central questions of the guideline were sent beforehand.

3.2.3. Interview Process & Transcription

The interview partners were contacted and invited by email. The email gave an introduction to the topic of the master thesis as well as the focus. The interview partners were given the choice of completing the interview via a video-conferencing tool (Zoom) or in person. The invitation email also included information about the approximate duration and that the interview would be recorded and transcribed for the purpose of analysis. It was ensured that the interviews would be treated anonymously. All interviews were conducted in German, citations are the result of my own translation.

Only two interviews were conducted in person, the others were all done via a zoom conference. The recording was done, either directly in the zoom-software, or using a smartphone in case of the in-person interviews.

At the beginning of the interviews, the interview partners were again briefed about the formalities (Gläser & Laudel, 2010). They were informed that the interviews and transcripts would be treated anonymously in the further process. An example description of their actor role was formulated to show how their responses would be cited within the thesis. Adaptations to this were undertaken if requested. The interview partners were also asked to verbally consent to the recording, this was recorded to be included in the transcript.

Before beginning, I provided a further explanation of the background and motivation for the master thesis. I also gave a short overview of what topics will be addressed. The interviewees were given the opportunity to ask me questions in case of unclarity. At the end of the interviews, there was another opportunity to provide comments or information that may have not been covered or that was important to them. Most interview partners took this opportunity to ask about the further work or highlight aspects that are particularly important to them. Nearly all interview partners asked what other actors were included. To ensure anonymity in the process, the answer involved stating different categories of actors (e.g., civil society, production, industry) and a reference to the desired balance in perspectives. I also used this opportunity to ask about further possible interview partners that they may have contact with or be familiar with. In case of specific replies, these were researched and contacted if i) they represented an additional perspective that was not yet covered by the interview partners, ii) they were also deemed to provide relevant information to the research questions following the same logic as the selection of the initial interview partners.

Transcription was completed in German using the transcription software within Microsoft Word 365 and revised manually. The interviews were transcribed word for word, omitting repetitions and 'filler' words (e.g., uhm, ehm) and translating colloquial shortcuts. Notes about the interview

partners' behavior were noted if they provided additional meaning to the statements made (Gläser & Laudel, 2010). Interruptions to the interview (e.g. due to phone calls or technical difficulties) and unclear passages were also noted in the transcript (ibid.)

3.3. Methodology for Analysis

All interviews and documents were analyzed using the QDA-Software atlas.ti. The order of analysis was based on the order of interview partners as shown in Table 1. The coding plan was created based on the guideline by (Kuckartz, 2018). Deductive codes, based on the theoretical framework provided by Critical State Theory (Buckel et al., 2014; Pichler & Ingalls, 2021) were specified inductively based on the content. The categories and sub-categories were continuously revised as additional material was analyzed, this resulted in a series of sub-categories being refined and renamed as the analysis progressed (Gläser & Laudel, 2010). Additional information on the Accumulation Regime and Mode of Regulation was also coded thematically. The codes were color-coded, defined, and systematically named within atlas.ti. The process is visualized in Figure 4 and described further below.

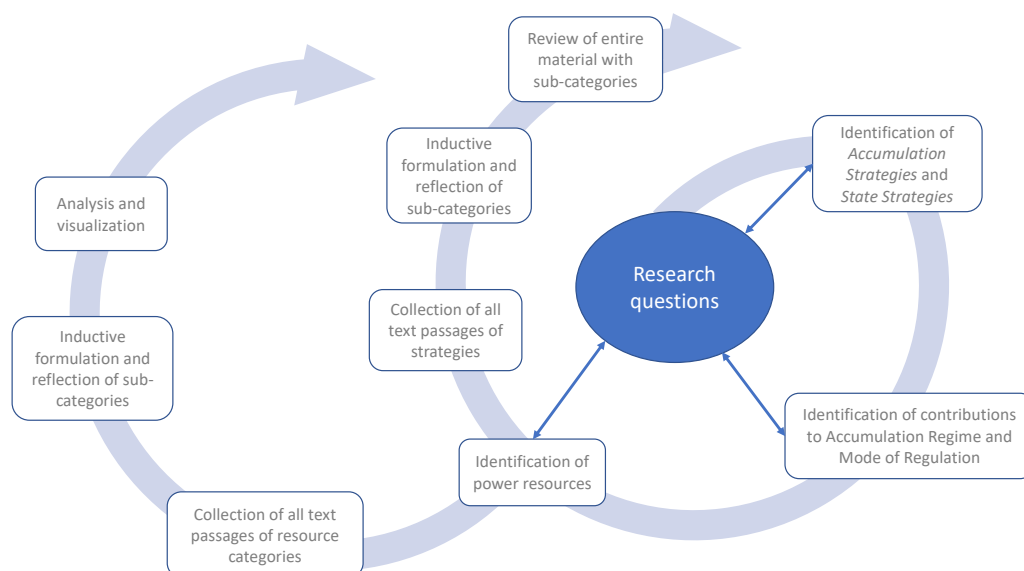


Figure 4: Own representation of structured content analysis adapted from Kuckartz (2018)

3.3.1. Actors Strategies

A directed approach, using the understanding that actors' strategies can either refer to an economic organization (accumulation strategy) or to state interventions and institutions (state strategies) was used to build categories for the analysis. The interviewees were clearly asked what their vision regarding meat consumption in Austria was, and how this should be achieved. In case the 'what' or 'how' was not addressed in the answer, this aspect of the question was repeated.

As a first step, the statements of the actors were assigned to the category *accumulation strategy* or *state strategy* by interpreting if the statement referred to a form of economic behavior and understanding (what) or to instruments and interventions to achieve this (how). To differentiate these strategies, the second step included the formation of sub-categories inductively from the content. This was done by looking at all the passages assigned to the main categories. Passages that referred to the current accumulation regime or mode of regulation were also coded to expand chapter 5. Table 2 shows the two categories for analysis with exemplary sub-categories. Accumulation strategies began with the shortcut "Acc_..." while state strategies began with "State_...". Further degrees of detail were added using the underscore.

Table 2: Categories and Sub-Categories determined as actors' strategies

Category	Exemplary sub-categories
Accumulation strategy	Acc_AlternativeMarkets, Acc_AgrReform_DeIntesification, Acc_Regionalization, Acc_Export
State strategy	State_ConsumerEducation, State_MarketForces, State_Regulation_ProductionStandards

3.3.2. Power Resources

The power resources were also coded using a directed approach based on the systematization of power described in section 2.6. It was differentiated between *organizational*, *systemic*, *discursive*, and *institutional* resources forming a code category for each. A description of these is provided in Table 3. The codes were systematically named within atlas.ti beginning with the type of resource. Additional degrees of detail were added using the underscore to form sub-categories inductively from the content.

Table 3: Main categories for identification of power resources (Buckel et al, 2014)

Resource type	Description
Organizational resources	Includes number of employees, financial resources, social contacts or networks to media and elites, knowledge of the functioning of the system or appropriate timing to initiate a project. Are attributes of the actors themselves.
Systemic resources	The ability of actors to make decisions with system relevant consequences. This can include the credible threat of removing resources (e.g., financial or labor) or taking actions that may impede economic activity.
Discursive, ideological, and symbolic resources	Describes the ability of actors to align their aims and interests with popular public discourse and symbols. This includes messages and images which the actors use that are aligned to public interest.
Institutional, strategic-structural resources	The extent to which the actors' strategies are aligned with selectivities and path dependencies within social, political, and economic institutions. For example, the use or expansion of existing laws, regulations, or markets.

Short passages of coded text were also discussed with colleagues in a peer review process to reduce subjective bias. Key statements, which succinctly formulated a specific strategy or resources were marked in the process to be used as citations.

3.4. Abstraction of Political Projects

Throughout the analysis process, parallels and similarities between actors' strategies were considered and reflected upon. Actors were grouped into political projects based on their visions of future development of meat consumption and how this will be achieved (see Pichler & Ingalls, 2021). These groupings are analytical abstractions of the actors' strategies, rather than reflections of political alignments. While the political projects may also include actors that explicitly refer to each other, this was not central to the grouping. The projects were named according to the central vision of meat production and consumption and the central strategies. Throughout the analysis and abstraction, the categories and projects were discussed with the

supervisor. Before completion, the abstracted results were also discussed with another individual knowledgeable in the field of agricultural politics in Austria.

4. Accumulation and Regulation of Meat Production and Consumption in Austria

Accumulation, the process of adding productive capital to invested capital, presents a main building block in capitalism. A regime of accumulation, therefore, represents a certain form of organizing production and consumption, in order to allow for a relatively stable period of accumulation (Ward, 2003). Accumulation regimes are embedded institutions that determine their persistence. These institutions include capital-labor relations, forms of competition, financial institutions, forms of state regulation, and international relations (Labrousse & Michel, 2017). The accumulation regime is therefore characterized by what, and how it produces to meet the present demand, as well as how it shares or redistributes the profits made. Accumulation is dependent on a demand for the commodity it produces but also on the material organization of its production (Allaire & Daviron, 2019).

The accumulation within sectors nationally is embedded in the international context through global forms of regulation, global trade, and global institutions. National patterns of production and consumption are therefore embedded within an international accumulation regime. To describe global patterns of production, consumption, and regulation with regards to food, Friedmann and McMichael have coined the term Food Regime linking *“international relations of food production and consumption to forms of accumulation broadly distinguishing periods of capitalist transformation since 1870”* (Friedmann & McMichael, 1989, p. 95). The Food Regime Theory is described in more detail in chapter 2.3.

In the case of livestock rearing, accumulation can be understood as the process of extracting capital (profits) out of invested capital (the animals). Animals as livestock, have become *species of capital* (Schneider & Coghe, 2021, p. i), which are produced for the market and traded at their *exchange value* rather than their *use value* for the purpose of creating profit and sustaining the businesses involved in rearing them (Gunderson, 2013). Technological innovations have pressed the limits to accumulation that are imposed by natural processes to increase profits through efficiency gains and standardization (technology in feed to increase weight gain, advancements

in animal breeding to optimize production). The commodification also involves alienation and spatial organization separating consumers from production processes (Neo & Emel, 2018).

The mode of regulation concerns the prevalent rules, norms, and structures that influence the accumulation regime. Both the mode of regulation and the corresponding accumulation regime are the result of past power struggles and compromise, where the strategies of powerful actors have become manifested in the economic organization and state control of accumulation.

The following chapter will provide an insight into the production, trade, and consumption regimes of meat in Austria, to shed light on how accumulation is organized and regulated. As meat consumption in Austria is dominated by beef and veal, pork, and poultry, which make up 97% of the consumption (AMAIinfo, 2021b), these were the main focus of the analysis.

4.1. Meat Production in Austria

Primary production, which encompasses agriculture and forestry, contributed 1,3% or 9.7 billion euros of gross value added to Austria's economy in 2020, the majority, 7.7 billion euros, was produced in agriculture (Bundesministerium für Landwirtschaft Regionen und Tourismus (BMLRT), 2021b). This contribution has decreased from 2% in 2003 and 4,2% in 1988 (Fink et al., 2005). Considering the whole value chain of agricultural production, Sinabell and Streicher (2020) found that food and agriculture contributed 5.2% of the national GDP in 2018, where 0.9% was attributed to agriculture. Simultaneously, the total value of production at producer prices in agriculture has increased nearly six-fold from 1960 to today. The proportion of this value attributed to animal production, and to livestock production specifically, was 25% or 1,892 million euros (BMLRT, 2021b). Correspondingly, husbandry is an important component of Austrian agricultural production, 39% of farms fall into the classification of husbandry farms, and overall 60%, or 97,095 farms, keep livestock (Statistik Austria, 2016).

The total gross production amount in tons (national production including exports and subtracting imports), has increased for all meat types while the actual number of animals has decreased for

pork and cows (all types) and only increased for poultry (BMLRT, 2021g). The increase in gross production was strongest between 1960 and 1990, indicating increased productivity in husbandry. Pork and beef markets alone make up 23% of agricultural outputs in Austria (Pröll et al., 2022). In 2019, 910,287 tons of meat were produced in Austria, leading to a self-sufficiency of 109% (BMLRT, 2021b).

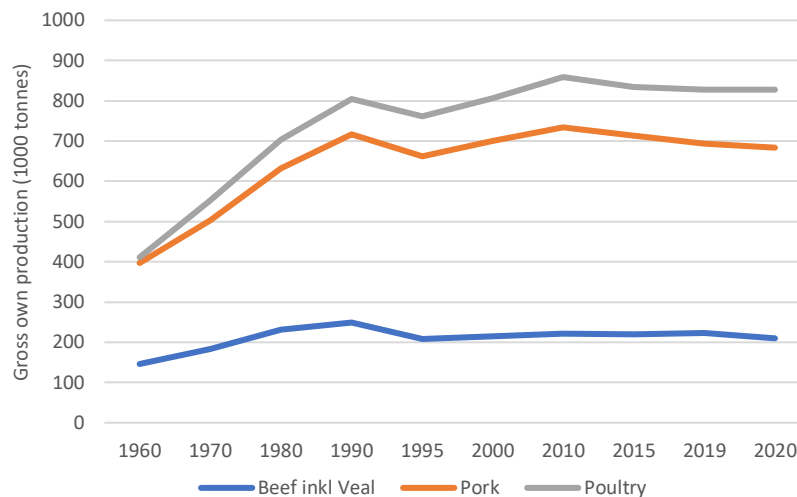


Figure 5: Development of gross own production (1,000 tons) in Austria for beef incl. veal, pork, and poultry meats (BMLRT, 2021g)

4.1.1. Structure of Animal and Meat Production

The majority of agricultural production occurs in only three provinces (Lower Austria, Upper Austria, and Styria) making up two-thirds of the total produced value (Statistik Austria, 2021b). Upper Austria contributes the highest share to animal production (31%) followed by Lower Austria (23%) and Styria with 21% (idib.). Krausmann et al. (2003) highlight the process of spatial concentration where in 1960, cattle were kept at low concentrations all around the country, while in 1995 cattle farming had become highly concentrated in the hilly pre-alpine regions in Upper Austria and other fringes of the Alps in the north and south of the country. Similarly, while the production of pork has historically been dominated by Lower Austria, Upper Austria, and Styria, comprising 70% of pigs in 1950, this has increased to 80% in 2020 (Statistik Austria, 2021a). Upper Austria alone has 40% of all pigs that are kept in Austria (idib.). This is especially concentrated south of Wels, around St. Pölten, and in southern Styria where some municipalities have over 50,000 animals (Stinglmayr, 2019).

The majority of farms are led as family farms (Statistik Austria, 2020) meaning that the farm is run and passed on within the family. Austrian husbandry farms are also described as being particularly area-bound (*flächengebunden*). This is reasoned by the fact that Austria, compared to other European states, has low animal densities declared to be adapted to the production capacity of the location. Farms also frequently produce their own feed (BMLRT, 2021b). Notwithstanding this, Schlatzer et al. (2021) found that Austria imports 714,000 tons of soybean feed, mainly from Brazil and Argentina.

Despite being characterized by family-run farms, there has been a trend of increasing concentration in Austria with fewer farms rearing a larger number of animals (Kirner, 2014). Figure 6 illustrates the change in animal numbers and farms and shows a clear decrease in the number of pork and cattle farms, while the animal numbers have only slightly decreased. The resulting average number of animals per farm has increased by over 60% for cattle farms, 40% in pork farms and more than doubled in the case of poultry as is shown in Figure 7.

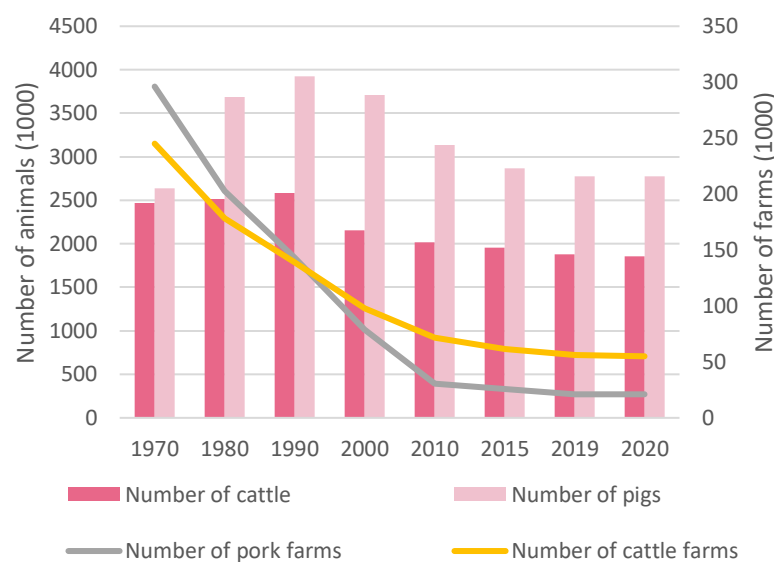


Figure 6: Development of livestock numbers and farms in Austria (BMLRT, 2021e)

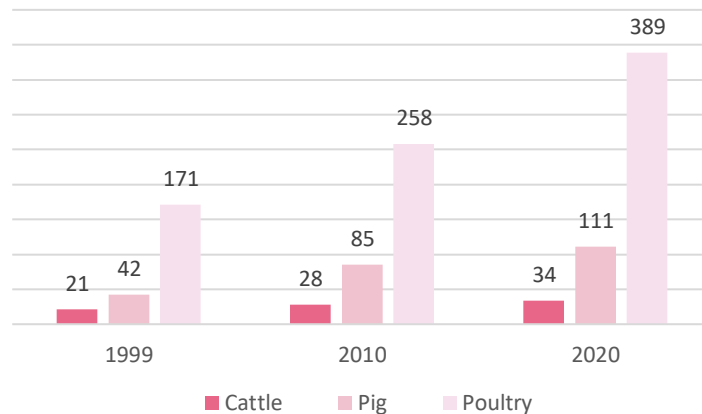


Figure 7: Average number of animals per farm in Austria (Statistik Austria, 2020)

Beef and Veal Production

Characterized by mountainous grasslands in many regions, ruminants such as cows, bulls, and ox play an important role in Austria's agriculture. Ruminants provide the possibility of converting biomass from marginal lands into protein and energy available for human consumption in the form of milk or meat. This also makes beef production the most resource-intensive form of meat production. While intensive beef production with added feed today can be completed in under 600 days (BAB, 2022a), extensive systems where animals are able to graze on marginal lands can take much longer. It is estimated that 33-50% of cattle in Austria have access to pasture and 16% are brought onto mountain pastures (Schlatzer & Lindenthal, 2018a). Around 22% of cows are held organically (NTÖ, n.d.-a). The beef market is highly differentiated with around 75% of beef products sold under some quality program (idib.).

The total number of cattle farms has decreased from 194,500 in 1977 to 55,000 in 2020. The number of cattle has also decreased, yet to a lesser degree making cattle farming more concentrated. While over half the cattle farms had between 1-9 cows in 1977, today only 24% of farms have 10 or fewer cows (BMLRT, 2021g). While the Austrian beef sector is still relatively small-structured, the market concentration has increased by 40% in the last 10 years (Pröll et al., 2022).

Pork

Farms with pork production predominantly have a small structure. The average farm has 141 animals, this has steadily increased from around 70 animals in 2007 (Agrarmarkt Austria, 2022). Yet the majority of animals are held in larger, specialized farms, these had an average of 640 animals in 2020 (NTÖ, n.d.-a). In 2020, around 2% of farms with pigs had over 1000 animals, comprising 20% of all pigs in Austria (BMNT, 2019). Organic production of pork remains low with approximately 2,4% of the producers and 1,1% of the animals under organic practices (Schlatzer & Lindenthal, 2018b). A total of 84% of animals in pork production were held on fully slated floors (BMLRT, 2021).

Austrian Pork production is characterized by mixed farms that also have cropland and produce their own feed. This allows for the own production of much of the feed, while soy is frequently still imported (Land Schafft Leben, 2022b; Schlatzer et al., 2021). Austria also has its own national pig breeding program (idib.). Globally, pork breeding is less concentrated than for example, chicken where the genetic material is dominated by few multinational firms. More frequently in pork production, there are also farmer-owned or cooperative breeding programs (Neo and Emel, 2018, p. 43).

Poultry

Poultry, especially broiler, farming has experienced rapid growth in recent years. While only around 50,000 tons were slaughtered in Austria in 1980, in 2020 this had increased by over 200% to 125,000 tons in the year 2020 (BMLRT, 2021g). This was accompanied by a dramatic decrease in the number of farms. Historical statistics reveal that in 1970, the number of holdings with broilers for human consumption was at nearly 43,000 tons, by 1990 this had decreased to 3,400 (Statistik Austria, 1990). In 2020 this number was below 2,000 holdings (Statistik Austria, 2022a). The ZAG (Zentrale Arbeitsgemeinschaft für Geflügel) even states figures as low as 687 holdings, with 95% of these having space for 1,000 or more chickens (NTÖ, 2021). This degree of concentration varies substantially between different forms of poultry with turkeys, ducks, and geese being held in smaller numbers. It is approximated that a holding exclusively producing

broilers will require around 40,000 animals in order to live from only meat production (Land Schafft Leben, 2022a). In 2020 there were 39 farms, which reached this threshold (Verbrauchergesundheits-Informationssystem, 2020). Due to the short amount of time needed to rear broilers to the desired weight, a conventional farm can have over 7 production turnovers a year (Bayrische Landesanstalt für Landwirtschaft (LFL), 2022).

Similar to the concentration in rearing and production, the chicken sector is known for highly concentrated breeding operations. The majority of genetic material is controlled by 4 companies (Cobb-Vantress, Aviagen-Broilers (EW Group), and Hubbard (Group Grimaud)) which supply 95% of global commercial breeding stock for broilers (Neo and Emel, 2018, p.42). This has resulted in only one breed, ROSS 308, being used for conventional chicken meat production, and another being dominant in organic production (Land Schafft Leben, 2022a). 22% of poultry production is certified organic (BMLRT, 2021b). The proportion of organic broiler production has increased ten-fold in the last 10 years (Bio Austria, 2020) and is predicted to continue growing. A total of 297 holdings produce organic chicken meat (Land Schafft Leben, 2022a).

Similar to pork production, poultry meat farms frequently also have crop areas producing their own feed or also keeping other animals (Land Schafft Leben, 2022a). Broiler production occurs on a contractual basis between farmers and slaughterhouses where farmers only provide the stable and labor, while other input costs are mainly carried by the slaughterhouses (idib.; 111).

4.1.2. Employment and Income in Austrian Meat Production

Corresponding to the decreasing number of farms, the amount of people working in agriculture has also decreased. In 2016, nearly 405,000 people worked in agriculture and forestry (employed or self-employed), this is a decrease of 2.3% from 2013. In 1951, this figure was as high as 1.6 million workers (BMLRT, 2021b). The majority, 82,3%, of people working in agriculture and forestry in 2016 were workers from within the family. While the number of family workers decreased from 2013, the number of workers from outside the family increased. Husbandry farms have the second highest proportion (97%) of the workforce that is not remunerated,

meaning that the majority of the workforce probably comes from within the family (BMLRT, 2021a).

Austrian households with an income that predominantly comes from agriculture have a lower income than other households in Austria (Sinabell & Fensl, 2013). In 2020, the average annual income for a farm amounted to 28,368 Euros (BMLRT, 2021b), while the median household in Austria had an available income of 39,549 Euros (Statistik Austria, 2021d). While the household income of beef-producing farms is lower than this average, the income for specialized pork and poultry exceeds this average value by 135% and 70% respectively (BMLRT, 2021b).

An increasing number of farms are being run on a part-time basis, where there is an additional source of income for the family coming from another job. Since the 1980s, the number of farms run on a part-time basis has exceeded the number of farms run on a full-time basis (BMLRT, 2021b). In 2016, 55% were run part-time (ibid.). The requirement for an additional income to secure livelihoods is also reflected in the following statement by an interviewed actor:

“Those that are a little experience in the field know that a farm with 500 pigs can’t feed a family. That can only be a sideline farm. On average over the years, you have a margin of 10€ per pig, which means if a farmer has 500 pigs, then 1000 pigs reach the market in a year, if nothing happens, that’s a 10,000€ margin, the labor isn’t even calculated there. And with 10,000€ a year, you can’t feed a family, that means somebody else in the family is required to work on the side to finance the agriculture.” (I8)

Specialized husbandry farms, on the other hand, have the highest proportion (80%) of income that comes from within agricultural activity (BMLRT, 2021b). The percentage of income that comes from public sources (subsidies) is also lowest for specialized husbandry, with the majority coming from area-bound direct payments for feed crop production (idib. & I11).

4.1.3. Producer Prices and Margins

As the interviews showed, farmers are increasingly under pressure to find additional sources of income due to low producer prices and shrinking margins (I8). Until 2022, prices for food had been rising since 1960, due to increasing capital costs (Sinabell, 2016). Yet, adapted to inflation, prices have decreased (OECD/FAO, 2021). This is also the case for meat products, which have not increased as much as the standard of living becoming cheaper in real terms (OECD/FAO, 2021; Rivera-Ferre, 2009). This also corresponds to the decreasing household expenditure on food and meat (Statistik Austria, 2017). The pandemic brought a sudden increase in the prices of agricultural products, food, and necessary inputs (Baumgartner & Sinabell, 2021). Rather than improve the situation for farmers, especially husbandry farms have been affected by rising input prices which are only asymmetrically transferred to consumer prices (idib.). This trend has been further exasperated by the war on the Ukraine (Beirer, 2022), which is especially important in the production of maize used in pork and poultry feed. Feed comprises the largest proportion of input in agriculture, of the 4.3 billion euros spent in 2019 on intermediate inputs, 1.5 billion was spent on feed (BAB, 2022b). The self-sufficiency in protein feed is highest in the beef sector with only 9% having to be imported, while in pork production the self-sufficiency is only 64% and 56% in poultry production (BMLRT, 2021d).

The pattern of increasing input prices, which are not as rapidly complemented by increasing consumer prices drives the need to intensify and increase production (Sinabell, 2016). With agricultural production designed around quantity and efficiency, the producer margins (difference between revenue and variable costs) are especially low leaving little leeway for a sudden increase in input prices. While beef production has the highest producer prices per kg of meat and the highest margin of 374 Euros per animal in 2020 (BMLRT, 2021b), the situation for pork and poultry is more tense. Pork has a notoriously volatile producer price (swine cycle) and low margins. In 2020, prices decreased, and the producer margin was 19 Euros per animal. This is a decrease of 56% from the prior year. The price of 1kg of pork at farm gate was as low as 1,71 Euros (BMLRT, 2021b). In 2022, the price sank further to 1,40 per kilo prompting the Chairman of the Bauernbund to proclaim that farmers were making a loss of 25 Euros per raised pig (Kraml,

2022). In broiler production, a margin of around 70 cents per animal is estimated (Bayrische Landesanstalt für Landwirtschaft (LFL), 2022)

4.2.Slaughtering and Processing

Similar to the farm structure, slaughtering and meat processing in Austria is characterized by a relatively small structure. In 2019 there were 870 businesses under the classification of slaughtering and meat processing (Statistik Austria, 2021c). 135 of these were slaughterhouses, 11 of which slaughtered chickens (idib.). The majority of slaughtering and meat processing businesses are small, classified as having up to 9 employees, and only 14 businesses have over 250 employees (Statistik Austria, 2022b). Despite this, Pröll et al. (2022) find that the majority of animals are slaughtered in a small number of large firms, processing over 6000 cattle, 2500 calves, or 50,000 pigs annually over the observed time span between 2010 to 2020.

Additionally, there has also been a process of concentration in this sector with an increasing number of businesses closing their doors due to high competition. In 2017 there were 909 businesses and a sales revenue of 4.56 billion euros, in 2019 this had decreased to 853 businesses (BMLRT, 2020; 2021a). Looking at the upstream market of beef and pork, Pröll et al. (2022) found increasing market concentrations of both markets, the concentration in both cases is considerably higher than the downstream production. This has also resulted in a lower number of employees. In 2018 meat slaughtering and processing employed 17,971 persons, in 2019 this had decreased to 13,045 (BMLRT, 2020; 2021a).

4.3.Self-sufficiency and Trade Relations

The degree of self-sufficiency in foodstuffs is a much-cited number when discussing national food security and agricultural development. The degree of self-sufficiency states the relation of national production to national consumption, a value over one hundred shows that the country produces as much or more than it consumes, but this figure does not consider relations of trade that influence the availability of products. Austria had a self-sufficiency of 109% in meat products

in 2019 ranging from 76% for poultry, 102% for pork, and 140% for beef and veal (BMLRT, 2021b). As only certain parts of the animal are frequently consumed, many by-products are left. For example, the self-sufficiency of offal is as high as 634% (Statistik Austria, 2021f).

The degree of self-sufficiency also conceals the dependence on imports for production. The degree to which production relies on imports varies by sector, for example in poultry production, the import of genetic material in the form of chicks from multinational breeders in Germany and the Netherlands (Land Schaftt Leben, n.d.). Both poultry and pork production relies on the import of soybeans for feed. Soy makes up around 20% of the feed rations in poultry production and 18-20% in pork production (Land Schaftt Leben, 2022a, 2022b). These imports have been strongly criticized in the public due to the large amounts of soy produced in South America and being brought in direct connection to rainforest degradation.

Austria has a positive trade balance for beef as well as pork (BMLRT, 2021f), meaning it exports more than it imports. The trade balance is only slightly negative for poultry. Pork exports make up the largest proportion of meat exports and have grown in importance from under 50,000 tons in 1995 to around 217,000 tons in 2020 (Chatham House, 2020). Germany is the largest trading partner for animal products and meat making up nearly 50% of the imported beef and approximately 74% of the imported pork (BMLRT, 2021f). The export market is more varied where mostly other EU countries such as Italy are important trading partners. Over 25% of pork exports from Austria directly leave the European Union with the largest portion going to China, followed by Korea and Japan (BMLRT, 2021g). Liberalized trade markets make Austria dependent on the development of agricultural production around the world. For example, high export numbers to China can be explained on the one hand through China rebuilding and restructuring its pork sector after cases of African Swine Flu and lower imports from Germany, where the African Swine Flu has been more of a problem (I9).

In the last 10 years, there has been an increasing export orientation in the Austrian agri-food sector. Revenues from exports are the main driver of turnover growth in the sector and are seen

to be driving investment dynamics (Fi-compass, 2020). The export of meat products was also named in interviews as an important outlet for by-products and cuts, that are not frequently or only seasonally consumed in Austria (I9, I6, I12, I13). The Ministry of Agriculture also cites export of agricultural export as central to the economic development of Austria's producers and *"urgently necessary"* for the economic security of processing businesses (Bundesministerium für Landwirtschaft Regionen und Tourismus (BMLRT), 2021b, p. 144).

4.4.Sale and Commerce

A large majority, 90%, of the value of food purchases takes place in food retail, only 6% is attributed to specialized retailers or other sources, and 3% to direct marketing (AMAMarketing, n.d.). This figure is only slightly different for meat purchasing where between 82% of the value of fresh meats is purchased in food retail, this figure increases to 89% for processed meats (idib.). This underlines the importance of food retail corporations in the last leg of the meat value chain, the sale to consumers. The four largest retailers (REWEGroup, SPAR, Hofer/Lidl) have a market share of over 90% as indicated in Figure 8. The top 4 food retailers' revenue from meat accounted for 90% of the meat industries' revenues – an increase of 3% from 2014 to 2020 (Pröll et al., 2022; Statista.de, 2022a).

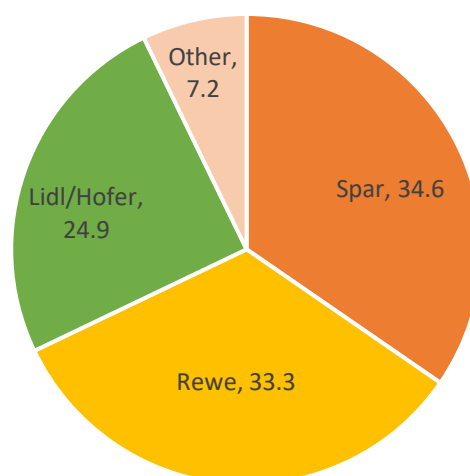


Figure 8: Market share (%) of largest retail chains in Austria 2019 and 2020 (Statista, 2022)

In addition to this, there is an extremely high density of food retail locations in Austria with around 60 stores per 100,000 inhabitants in Austria while in Germany this figure is only 45 (Statista.de, 2022b). While sale prices of meats have been increasing in food retailing, ranging from 12 Euros per kg beef to 7 Euros for a kg chicken meat, the proportion sold in price action is also high, 44% of pork in food retail is sold under a price action (Mayr, 2020).

4.5. Consumption of Meat in Austria

National statistics show that per capita consumption of meat amounts to 60.5 kg in 2020, a slight decrease from 62.6kg in 2019. (AMAIinfo, 2021). The year 2020 marked the first year that annual per capita consumption fell below 62kg, although this decline must be treated with caution due to changed conditions through the closing of restaurants during the COVID-19 pandemic. The composition of meat consumption can be seen in Figure 9. Pork is consumed at the highest frequency with 35.4kg followed by poultry with 12.5kg which has seen the largest rate of increase over the last 20 years. In total 10.9kg of beef and veal were consumed. The section of other meat consists of mainly sheep and goat meat with only minor amounts of horse meat consumed (Statistik Austria, 2021f). These figures represent the amount available for human consumption, the total meat use in Austria, including cuts not used for human consumption, amounted to 90.8kg per capita (AMAIinfo, 2021).

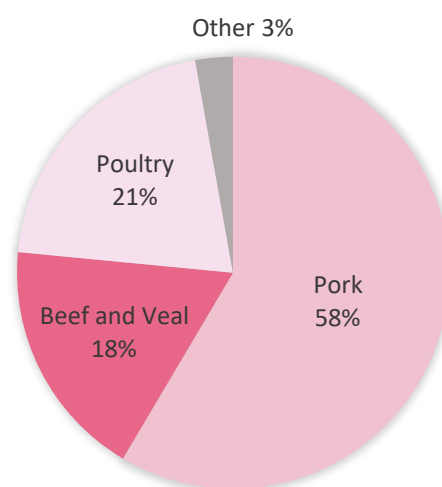


Figure 9: Share of meat types in per capita meat consumption 2020 (AMAIinfo, 2021)

The amount of meat consumed has remained steady over the last 10 years with only slight decreases. Previously to this, meat use (incl. cuts not used for human consumption) increased over two-fold from 38kg per capita in 1950 to 93kg in 2010 (Willerstorfer, 2013). Figure 10 also shows the change in the composition of meat consumption, while beef and veal have lost significance, horse meat has nearly completely disappeared from the menu. The number of people who consider themselves vegetarian or vegan has doubled from 3% in 2012 to 6% in 2018, yet 78% still consider themselves meat eaters, and the number of flexitarians, which only eat meat selectively and occasionally, has remained steady at 16% (Mayr, 2020).

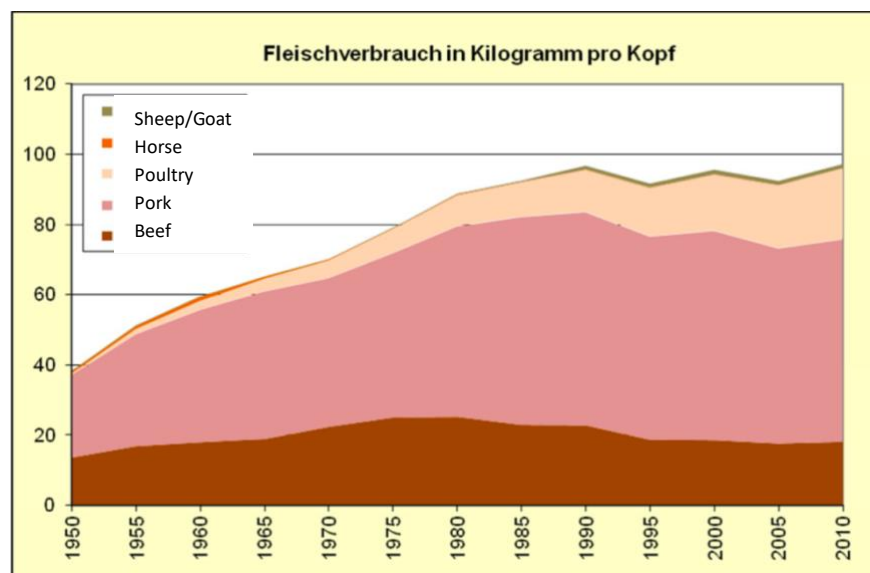


Figure 10: Development of domestic per capita meat use (incl. cuts not used for human consumption) 1950-2010 (Willerstorfer, 2013)

The average household in Austria spends 10.8% of its monthly expenditure on food (excluding beverages) (Statistik Austria, 2021e). This lies well below the EU average of 14.8% (Eurostat, 2022). The purchase of meat and meat products comprised the highest proportion (22,8%) of household food expenditure in Austria (Statistik Austria, 2017). Despite being the highest proportion, this is a decrease from the 1970s where meats made up around 37% (ibid.). Sausage, ham, and other processed meats make up around 46% of the expenditures on meat (Statistik Austria, 2021e). The proportion of food expenditure spent in restaurants, canteens, and other gastronomic businesses, has been increasing. Estimates suggest that 40% of calorie consumption occurs outside of the own household, this is 35% of the expenditure. In 1974 this figure was only 13% (BMLRT, 2021). Gastronomy and bulk consumers comprise around 40% of the pork sales

(Mayr, 2020). These figures both represent the situation before the pandemic, which dramatically reduced consumption in gastronomy.

Of all avoidable food waste in households, meats and fish make up 11% of approximately 4,7kg per household and year (Obersteiner & Luck, 2020). It is estimated that 65% of avoidable food waste occurs in the household or in gastronomy (Hietler & Pladerer, 2019). Hietler and Pladerer (2017) also calculate that 4% of meat wasted in Austria is avoidable, this comes to 7,400 tonnes of meat annually.

4.6.Regulation of Meat Production and Consumption

The described accumulation regime is regulated by prevalent rules, norms, and structures that influence its organization and development. The production and consumption of meat are embedded in Austrian agricultural, food, and consumer protection policies. Agricultural policies regulate the mode and level of production while food and nutrition and consumer protection policies concern availability, marketing, and transparency for the consumption of meat products. On the level of government, these policies are separated between the Federal Ministry for Agriculture, Forestry, Regions and Water Management, The Federal Ministry of Social Affairs, Health, Care and Consumer Protection, and the Federal Ministry of Economic Affairs. These ministries are currently split between the coalition parties (Austrian Peoples Party and the Green Party), which need to agree on regulatory proposals before these are presented to parliament. Yet, also smaller, and informal institutions such as producer organizations and voluntary labeling play an important role of regulating production and consumption.

4.6.1. Agricultural Policy within the European Union and Austria

Motivated by post-war rationale of food security, agricultural production in Austria is oriented towards increasing productivity, self-sufficiency, and exports. Previous to the EU accession, Austria had already implemented a high level of financial support in agricultural production (Mannert, 1991). With a high proportion of ‘disadvantaged’ regions in the Alps, that could not modernize and specialize as effectively compared to the plains in the east, uneven economic and spatial development was a central topic in agricultural policies (Schermer, 2015). These

disparities and increasing rural exodus fueled critical voices that were analyzing the developments from a structural perspective. As a result, scientific and financial means were provided to support concrete actions for endogenous development in the 'disadvantaged' regions (ibid.).

By the time Austria started to discuss accession to the EU in 1987, the environmental movement had continued to grow and the Greens had entered national parliament (Schermer, 2015). The agricultural sector became a central site of conflict as it became clear that direct competition with favorable regions in the whole of Europe would require substantial restructuring. On a global scale, the completion of the GATT (General Agreement on Tariffs and Trade) also demanded a shift to less trade-distorting support measures (Salzer, 2015). As a response, the term 'ökosoziale Agrarpolitik' was coined by the then agriculture minister, Josef Riegler. This concept of eco-social agricultural policy aimed to create "*ecologically and economically appropriate peasant-type agricultural production methods*" (Riegler, 1988 translated by Schermer, 2015, p. 126). With the legitimization of providing high-quality, regional, and safe food to the consumers and ensuring farmers' livelihoods, it also served to generate public support for increasing public funds in agriculture (Hoppichler, 2007). Within the eco-social agricultural policy, the market remained the central mode of regulation, creating, essentially, neoliberal agricultural politics, where the market must be mobilized for ecological and social aims (Salzer, 2015).

Today, embedded in the European Union, agricultural policy in Austria today is guided by the EU Common Agricultural Policy (CAP) which provides the framework for agricultural support. The CAP defines its goals to increase agricultural productivity and individual farmer earnings, stabilize markets, assure the availability of supplies and ensure reasonable producer prices. This is achieved through financial support, dominated by direct payments to producers (European Commission, n.d.). While in the past, these payments have been linked to production levels, today they are based on payments per hectare cultivated area, additional ecological efforts, and support of rural development. This reform was also largely driven by Franz Fischler, former Austrian agricultural minister, and EU Commissioner. The EU Green Deal and the subsequent

Farm to Fork Strategy are the most recent expansions of the CAP that aim to integrate more ecologically and socially holistic approaches putting aspects of fairness, health, and environmental sustainability at the center (European Commission, 2020). The Farm to Fork Strategy even states the aim to move to *“more plant-based diets with less red and processed meat”* as an important step to contribute to public health and reduced the environmental impact of food systems (European Commission, 2020, p. 14). How this is achieved remains up to the member states, which develop individual policy instruments within the CAP framework.

In total, Austria distributes 2,252 million Euros through CAP financing, a figure, which has increased annually (Bundesministerium für Landwirtschaft Regionen und Tourismus (BMLRT), 2021b). In contrast to other EU countries and in line with its previous political efforts to reform EU agricultural subsidies, Austria spends the majority (51%) of the budget on measures within the ‘second pillar’, which includes measures to increase the sustainability of agricultural practices and support rural development (Bundesministerium für Landwirtschaft Regionen und Tourismus (BMLRT), 2021b). Under one-third (31%) of the payments are provided through the ‘first pillar’, which comprises mainly the above-mentioned direct payments to farmers based on the cultivated area and additional ecological measures (Greening). Compared to other agricultural production, husbandry farming in Austria receives the lowest proportion of farm income from public subsidies. As stable area does not fall under cultivated area, husbandry farms can receive payments based on the area used for growing feed crops, compensation payments for geographic disadvantage, ecological payments, or investment support (Bundesministerium für Landwirtschaft Regionen und Tourismus (BMLRT), 2021b).

Since 1945, besides a period of 16 years from 1970-1986 under Socialist Party governance and the period of expert governance in 2019, the agricultural ministry (BML) has consistently been run by the Austrian Peoples Party (ÖVP). The ÖVP with its associated BauernBund has therefore been leading in the development of agrarian structures, administration, and policies in Austria (Salzer, 2015). Additionally, close ties to the Chamber of Agriculture and producer organizations are central to the formulation of agricultural policies (Salzer, 2015; I1).

4.6.2. Producer Organizations and Price Negotiations

Farmers are organized in producer organizations, which serve to bundle supply and increase bargaining power towards downstream processors. Pröll et. al (2022) found that approximately one-third of the producers of pork and beef are currently organized in various producer organizations. In return for a member's commission, the producer organizations provide service, training, joint input procurement, and joint marketing activities. Producer organizations also serve as political representations with seats in advisory bodies to the ministry or national agencies. Price negotiations occur between the producer organizations and the slaughtering/processing firms. Producers that are not members of the producer organizations can sell their products directly to processors either independently or through livestock traders. While they are not bound to the prices negotiated by the producer organizations, this price serves as a guideline for the whole industry. The slaughterhouses and processes then negotiate sale prices with the food traders and retailers further along the value chain.

4.6.3. Animal Welfare Policies

While they also address animal production systems, animal welfare policies do not fall under the umbrella of agricultural policies and are therefore in the responsibility of the European Directorate for Health and Food Safety as well as the Austrian Ministry for Social Affairs, Health, Care and Consumer Protection (BMSGPK). Several directives and regulations on EU level define legal minimum standards for the rearing, transport, and killing of farm animals which forms the basis of animal protection law by the BMSGPK. The enforcement and control of animal protection laws are in the responsibility of the nation-states. Since moving the competence of animal welfare policies from the provincial to the national level in Austria in 2005, regulations have been standardized and the legal status of animals improved through the implementation of animal protection ombudspersons, which form the legal representation in disputes (I4). Oriented towards animal protection, regulation focuses on the definition of minimum standards. There are also a few measures addressing the education, information, and training of stakeholders and officials to improve awareness and capacities for higher animal welfare standards (Simonin &

Gavinelli, 2019). Within the CAP, it was found that the majority of measures addressing animal welfare were through the second pillar (European Commission, 2022), which is majorly financed and designed by the member states. For example, in Austria, within the Program for Agriculture and Environment (ÖPUL) additional payments are provided for farms that increase available space and outdoor access for animals. This occurs either through the switch to organic production methods or by complying with the Animal Protection measure in ÖPUL (BMLRT, 2021a). Recently, the Farm to Fork strategy of the EU has opened discussions about EU Wide animal welfare labeling on animal products (European Commission, 2020, 19).

4.6.4. Relevant Consumer Protection and Health Policies

In the field of consumer protection and health, policies related to meat consumption and production specifically are limited (see Bergthaler, 2021). The national dietary guideline, created by the Austrian Society of Nutrition (ÖGE), recommends an annual consumption of 22kg of meat per capita. Yet this guideline remains a measure of information and advice, with no prescriptive property. Similarly, Austria follows a 'Health in All Policies' (HiAP) approach that aims to consider and incorporate aspects of public and individual health in all national policies. Currently, an intersectoral working group of the National Consultative Body on Nutrition under the Health Goal 7: Sustainable Diets acts as the main body of exchange and coordination. In their report from 2022, this working group directly addresses the too-high consumption of meat and defines a necessary indicator to be the daily consumption of meat (Bundesministerium für Soziales Gesundheit Pflege und Konsumentenschutz (BMSGPK), 2022). Additionally, this group has defined an indicator to measure to what extent the goal of sustainable diets is considered in other policies (idib.).

Regarding labeling policies and requirements, the ministry of economic affairs, as the ministry responsible for the interests of private businesses including the food industry and gastronomy is involved. It is especially concerned with ensuring the competitiveness of Austrian businesses in the European common market and beyond. No policies were identified to directly address or limit the marketing of meat products specifically. Consumers are protected from misleading

messages in the marketing of foodstuffs through the EU regulation on food information to consumers (EU 1169/2011). When a marketing claim is considered to be misleading is decided on a case-by-case basis dependent on the expectations of the consumers (Österreich ist informiert, 2021). A recent proposal brought forward by the Committee on Agriculture and Rural Development in the European Parliament to ban the use of meat-related terms when describing plant-based alternatives was rejected (Cullen & Tuson, 2020) and no such regulation has been implemented in Austria.

4.6.5. AMA Marketing and AMA Quality Seal

The AMAMarketing is the central structure in Austria concerning the promotion and marketing of agricultural products. The AMAMarketing GesmbH is a daughter corporation of and owned completely by the Agrarmarkt Austria (AMA), the national paying agent in charge of implementing agricultural policy measures. The role of sale promotion and marketing attributed to the AMA, is delegated to the AMAMarketing as defined in the AMA-Law. The AMAMarketing, therefore, acts as a profit-oriented corporation towards the aims of the AMA-Law concerning the development and promotion of quality programs, information, and marketing to strengthen sales of national agricultural products in Austria and outside (AMAMarketing, 2020). To achieve these aims, the AMAMarketing is involved in marketing campaigns nationally and internationally and has implemented the AMA quality seal (Figure 11) for food products produced in Austria. While this is not a state-controlled quality seal it is considered to be nationally accepted (I8).



Figure 11: AMA quality seal (AMAINfo.at)

The AMAMarketing quality seal is based on guidelines decided within the AMA Marketing expert panel for each product group, the relevant sector, and representatives from interest groups. While the AMAMarketing underlies control by the administrative board of the Agrarmarkt

Austria, which is appointed through the social partners, the representatives in the regulatory bodies of the AMAMarketing are not publicly known. Subsequently, the guidelines are submitted to the BMLRT and the EU Commission to control compliance with EU regulations. To be awarded the AMAMarketing quality seal, agricultural raw products have to originate from inside Austria, and the processing must take place in Austria. For animal products, the animals have to be born, fed, slaughtered, and processed within the country (AMAMarketing, 2020). Beyond origin requirements, the AMA quality seal for some products requires higher production standards than the legally defined minimum. For example, for pork production, the seal requires 10% more space for the sows, and also in beef production more space than EU law is required (AMAINfo, 2021a; 2022). Additional animal welfare and production improvements can be awarded by a further seal indicating higher animal welfare (+Tierwohl) or organic production methods (AMA Biosiegel). Reports from AMAMarketing claim that 60-70 percent of fresh meat sold in food retail has the AMA quality seal, this proportion drops to 30% in wholesale (AMAMarketing, 2020).

The AMAMarketing is financed through marketing contributions from the agricultural sector and in part also through subsidies provided through the CAP for individual marketing measures (AMAMarketing, 2020). The majority of financial resources are provided through marketing contributions by the producers (idib.). The height of contribution varies for different products and is decided by the AMA bodies. In 2020, the meat and poultry sectors contributed 32% and animal products in total made up approx. 87% of all the marketing contributions (own calculations based on AMAMarketing, 2020).

5. Actors, Strategies, and Power in Austrian Meat Politics

The collected data was analyzed and compiled along the lines of the research questions. The research questions concerned the relevant actors, which visions and strategies these follow as well as the available power resources. The final research question concerned the materialization of the actors' strategies in Austrian policies. This chapter first addresses and shortly describes the actors. The identification of actors within the food, more specifically meat, system in Austria is important in order to understand *who* is exerting power and also upon *whom* (see Baker & Demaio, 2019). Yet, power relations in food systems are complex and embedded in diverse networks of actors, therefore the second part of the results, further characterizes and groups the actors into political projects along the lines of their strategies. This section also portrays the materialization of strategies in recent policy debates and decisions.

5.1. Actors that Influence Meat Consumption

Actors relevant to meat politics in Austria were identified to be from the private sector, the public sector, and civil society. The results focus mainly on national actors, while international actors were also considered, where identified. The identification of actors is based on literature research as well as replies by the interview partners as described in section 3. Agricultural producers, the food industry, and retail were important actors with private interests. National politicians, government, international authorities, and civil society were also identified to influence meat consumption. Furthermore, media is seen to play an important role in public information, awareness, and opinion.

5.1.1. Industry Groups and Representation

Agricultural representation, producers, and producer organizations were among the most frequently named actors influencing meat consumption (I1, I3, I4, I5, I6, I8, I9, I10, and I12). Agriculture is represented in the political sphere through the Austrian Chamber of Agriculture (Landwirtschaftskammer), which is organized in each province and on the national level. Their interest lies in protecting and furthering the interests of all farmers in Austria by securing “*higher*

incomes and product prices“ (Landwirtschaftskammer Österreich, n.d., subtitle). As a chamber, the Landwirtschaftskammer is represented in ministerial bodies as well as closely cooperating with the state in administrative tasks such as the processing of promotional or educational measures.

Additionally, producer organizations for individual sectors, serve to bundle production, knowledge, and resources for economic success and increased bargaining power of the sector. The pork sector is prominently represented by the VÖS (Verband Österreichischer Schweinebauern) and also the Schweinebörse, which serves as a central information and marketing platform. The ARGE Rind is the largest producer organization in the beef sector, while the GGÖ is the only organization for poultry meat (see BMLRT, 2021). Recently a livestock sector overarching organization has been founded under the name of Nachhaltige Tierhaltung Österreich (Sustainable Husbandry Austria) with the aim of pooling competencies and information for producers but also coordinating public communication and policy positions (see NTÖ, n.d.) On the international and EU level, the Austrian Chamber of Agriculture and producer organizations are represented in various international organizations for knowledge sharing and exchange or political lobbying. Another frequently named representation of agricultural producers was the Bauernbund, a sub-organization of the Austrian Peoples Party (ÖVP) which furthers the interests of agricultural producers within the party. As such it has become an important player within the party and in parliament. As of July 2022, 10 of the 71 ÖVP representatives in parliament, have listed activities in the Bauernbund as a previous or current political function in the transparency portal of the parliament. The prominence of agricultural representatives in the political sphere led one actor to claim that *“it’s agriculture that does meat politics in Austria”* (I6).

With the legally defined aim of the promotion of agricultural products, the AMAMarketing was frequently identified as a relevant actor in Austria (I2, I4, I5, I9). Through its marketing activities, campaigns, and the quality seal, it plays an important role in shaping public perception of meat production in Austria. The AMAMarketing consists of multiple bodies which discuss and make

the guidelines for the different marketable products. These bodies also serve as central exchange platforms between actors on the production and retail side.

Upstream and downstream industries were also named (I1, I5, I8, I10). One actor highlighted the length of the value chain with a multitude of actors involved, invested, and profiting in the value chain: *“for a long time, before working in the field, I did not know how many different places are actually involved and how the system works”* (I5). Upstream feed producers, traders, and producers of other inputs have a private interest in keeping the demand for animal products and hence the demand for their inputs high. While Austrian producers, with a high proportion of farm available feed, are less dependent on global feed traders, feedstuffs still have to be imported, especially in pork and poultry production. Other inputs such as energy, genetic material (especially in the case of poultry), antibiotics, and other medical inputs, as well as technology and machines, are important. Downstream industry actors named were slaughterhouses and processing plants. The food industry is represented centrally by the Association for Food Industry within the Chamber of Commerce (WKO) which serves to represent their interests towards the public, political representatives, within ministerial and AMA Marketing bodies. Some processing businesses (mainly slaughterhouses) have already created a parallel production of meat alternatives to benefit from the growing interest in these products. For example, the Tann Fleischwerke, one of the largest meat processors in Austria, owned by the food retail chain SPAR, already created its own vegan meat production stream in 2012 (I13).

Food retail was also named very frequently to be an important actor concerning meat consumption (I2, I3, I4, I5, I6, I8, I11, I12). Food retailers were deemed to be particularly important as the main channel between production and consumption and a *“Gatekeeper”* (I2) regarding the transfer of information on production practices to the consumers. One actor highlights the central role by saying: *“The most important player here is definitely the food retail sector that has to go along if I want a transparent transmission”* (I12). Food retail was also frequently named by actors in relation to cheap prices and price promotions highlighting the interest of retail companies in the concentrated market to attract consumers from their

competitors, as is pointed out by an actor from civil society: *“supermarkets, I have to say, with these cheap meat price actions because there meat is wasted as a cheap lure”* (I4). On the other hand, one actor also claimed that food retailers were partially already more progressive regarding the marketing of meat alternatives (I6).

A few actors also identified gastronomy as an actor influencing meat consumption (I2, I5, I6, I12). While gastronomy (excl. public procurement) is varied, from small, regionally established restaurants to large canteens aimed at feeding the masses, they follow private interests aimed at making a profit. The relevance was claimed to come from their products frequently containing imported products purchased from wholesalers at lower prices, without regulation to ensure information for the consumer (I2). One actor also highlighted that gastronomy and large canteens play an important role in reaching a large number of people. Changes in menus here, towards more diverse and plant-based, are seen by actors as important steps towards a trend change (I5). Another actor pointed to gastronomy chains, such as McDonalds, already being pushed towards higher procurement standards through stakeholder pressure (I6). One actor also named public procurement as an important factor in shifting meat consumption toward regional origin (I12).

5.1.2. National State and International Entities

Public actors such as political representatives, the government, and international authorities were named by multiple actors (I1, I2, I4, I5, I6, I7, I8, I6). One actor from civil society claims: *„At the end of the day, we are a democracy, and that means, the 183 representatives in parliament are the essential players, of course, in realpolitik - the government.”* (I2). Within the state, the central actors were identified to be in the fields of agricultural politics, health politics, and educational politics. Many actors noted the heavy influence of lobby organizations on the ministry’s decisions as is reflected in the following quote by an NGO representative: *„also, very much the agricultural ministers, because these should actually represent all of agriculture, but you get the feeling that the livestock sector is very heavily represented”* (I4). In contrast, another actor pointed to the increasing influence of public opinion causing politics to move away from

clientelism and towards decisions more appealing to the mainstream: *“well, politics is partially just driven, and then the reaction there is towards the mainstream”* (I9)

The national government was identified to be especially important in setting minimal legal standards (I5, I9), and providing a framework for production and consumption through subsidies and investments (I5, I6, I9) in the case of agricultural policies but also by raising awareness (I5) promoting healthy lifestyles and measures to educate about healthy and sustainable diets (I16) in other policy areas. One actor pointed to the importance of the political parties in appointing the administrative council of the AMAMarketing (I2). Three actors (I1, I4, I12) also pointed towards the importance of the state and regional and national governments as having a role model function through their procurement policies.

International governance institutions and policies were named by only three actors (I5, I6, I7). These actors referred to international institutions as setting more progressive guidelines for the national governments to follow (I5, I7). One example of this regards limits on the marketing of foods with high fat or salt content by the WHO, which would limit the marketing of processed meats. They also referred to the international bodies, such as the WHO as being international authorities with competence, where policy options are discussed and suggested to the member states for implementation to achieve global goals (I7).

5.1.3. Civil Society

Multiple actors in the sphere of civil society were identified. Civil society here is considered to be groups of individuals, movements, non-governmental organizations, research, and consumers that are not acting for economic-profit (Baker & Demaio, 2019). Their interests lie in the public domain, or in the case of consumers, in their own utility.

Especially NGOs were named to play an important role in raising discussions and spreading information about meat consumption, animal welfare, and sustainability (I1, I2, I6, I8, I11, I12, I13). One actor pointed to the credibility of NGOs in their positioning on topics, due to the lack

of vested interests (I11). While others criticized populist measures and campaigns by NGOs in the interest of raising donations for financing themselves (I12). Other actors pointed to the ability and endurance of NGOs in driving topics, such as semi-perforated floors in pork production through the VGT (Verein Gegen Tierfabriken) generating public awareness, reporting in media (I6, I13) and pressure on political actors (I1). Science was named by only two actors (I1, I8), in the context of generating information for the public and to improve conditions within the value chain.

5.1.4. Media

The media, as a public actor, was also frequently identified in the actor interviews to have a considerable influence on the meat consumption (I1, I2, I3, I4, I8, I11). The interviewed actors pointed to the important role of media in forming public opinion defining it to be *“incredibly opinion-forming”* (I11). One actor described journalists and media, in general, to be *“Gate-Keepers of information and awareness-building”* (I2) also pointing to the growing volume of information that is available and published by a variety of actors, not only public media acting in the public interest. Media were identified to be especially important in deciding which discussions are present in the public, and what positions are heard (I1, I2, I4). One actor also pointed to the ability of media to generate emotions for topics that may not be visible to the public in everyday life, for example, the long-distance transport of animals (I8).

5.1.5. Consumers

Finally, the consumers and their purchasing decisions were named by three actors (I9, I10, I13). This could be due to the prior description of the research aim in the interviews, focusing on the political dimension of meat consumption. One actor highlighted the centrality of consumers in their purchasing decisions and willingness to pay for a certain quantity and quality of meat: *“Concerning meat consumption, there is one parameter and that is meat consumption and the willingness to pay for it, or not”* (I10). This actor also points to the paradoxical behavior of consumers, demanding higher standards, yet not willing to pay higher prices. Another actor underlines the role of consumers while also calling the attention to information and transparency

in purchasing decisions, this on the other hand requires legal standards (I9). The consumers are also referred to as driving market development towards more regional production and higher animal welfare (I13).

In the following section, the actors' strategies were analyzed to form political projects. Actors' strategies are formed based on their perception of the problem at hand, which is closely related to their interests and position in the value chain. Describing the different projects only along the lines of their position would result in objectifying and oversimplifying the actors' perspectives. Analyzing and grouping these actors into political projects along their accumulation and state strategies can shed a light on coalitions and synergies that comprise the complexity of power relations in the food system.

5.2. Actors Strategies and Resources – Description of the Political Projects

As a response to popular discourse around ecological boundaries, animal welfare, and healthy diets, there is an acceptance among the interviewed actors that meat consumption patterns need to change or are already changing towards 'less and better'. This view is also shared by incumbent actors in the sector as the statement by one meat industry actor shows.

"I would like to generally put out of question that, according to dieticians and nutritionists, we eat too much meat in Austria. So that is not healthy, [...] I believe that we will only be taken seriously if we accept facts that are there from the side of science, that we take these and in a fair manner also represent these to the outside" (I11)

Despite this seemingly shared understanding, the analysis showed that the actors have different approaches of what this entails and varying visions of where the development is going. The political projects, analytically abstracted from the strategies of the actors, are competing to influence this transition in the direction aligned with their interests. There is no clear separation between the projects, rather actors also have internal differences and may, on occasion, align with another project. Despite convergence of the projects, the abstraction serves to portray

general relations of power between these actors and their subsequent ability to influence meat politics. Some actors also form important bridge functions where the strategies of projects come together to further a singular political project. Through the analysis, three political projects could be abstracted. The dominant project is market and consumer patriotism oriented. An alternative political project is oriented towards agricultural reform. Additionally, a third incorporating political project based on integration and consumerism could be identified. Table 4 summarizes the central strategies and resources of the three political projects. The specificities and resources of these projects are described in the following section with examples of how these projects have been able to materialize their interests in Austrian food and agricultural policies.

Table 4: Summary of political projects' strategies and power resources (own elaboration and abstraction based on interviews and further documents)

	Market differentiation and patriotism	Agricultural de-intensification and structural reform	Retail integration and consumerism
Vision of meat consumption	Availability of national meats, always for everyone to choose	De-intensification of production and lower consumption	Availability of all meats, always for everyone to choose
Accumulation strategies	Increase consumption of better, Austrian meat Market differentiation Orientation towards export markets Protection from imports	Less and better meat de-intensification of production territorial markets to reduce dependencies	Liberalization and consumer power Market-oriented production Vertical integration
State strategies	Demand driven Support and subsidies for differentiation Consumer education and information Regulation preferably through AMA quality seal	Active state regulation of production, quantity, and marketing Increased participation in agricultural policy	Market forces – demand driven Private and industry initiative (vertical integration, retail brands) Consumer education and sovereignty
Institutional-strategic selectivities	AMA quality seal as pathway to politics Historical dominance in representation	Structural relation to Germany Participation of green party in government Structural barriers to participation Weak institutional status	Involvement of ministry of economic affairs on regulation
Systemic resources	Number of farmers Contribution to rural economy	Citizen and voter mobilization efforts	Economic concentration Increasing vertical integration
Organizational resources	AMAMarketing as a resource pool Close personal and organizational ties within project and to state actors Media relations and capacities	Well-connected but also competing Connections to retail, production and (increasingly) ministries Media relations and capacities	Network Handelsverband/WKO with ministry Integrated into ministerial bodies and AMA bodies
Discursive resources	'Austria has higher standards' 'We set the table' Historical slogans still effective today	Unveiling shocking images 'There is an alternative'	'Right to meat' 'Regulation is paternalistic' Aligns with other projects
Change strategy	Incremental Small changes within the system Incorporates alternatives and niches within the system	Reformer, revolution Demands for system and structural changes Initiates and develops alternatives in production and consumption	Reactive Incorporates alternatives if they are profitable Incorporation as fastest way to profit from changing demands
Central actors	Production, agricultural representation, and industry	Civil Society, NGOs, science	Retail, gastronomy

5.2.1. The Dominant Political Project – Market Differentiation and Patriotism

The dominant political project emerged with the beginning intensification and industrialization of agriculture in Austria after the second world war and represents the current dominant patterns of accumulation and regulation. It is driven by actors on the production side. The project follows a productivist vision of agriculture while the historical development and geographic disparities in Austria also fostered the support and development of alternative niches. This entails an acceptance of extensive production methods and alternative protein sources, as long as these trends do not threaten the dominant production patterns which still include high amounts of conventional agriculture. Carnism, the ideology that human consumption of meat is normal, natural, and necessary is deeply entrenched in actors within this political project (I9, I10, I11). The role of meat at the center of the plate and affordable for all can be seen by the statement of an agricultural representative: „Surely, the, let’s say ‘cheap schnitzel’, that hangs over the sides of the plate, will not disappear, but, that segments will be developed next to that...” (I9).

The dominant project draws upon close relations to agricultural politics resulting from years of close cooperation and personnel overlaps between agricultural representation, ÖVP agricultural groupings, the ÖVP controlled ministry, and members of parliament. With husbandry farming compromising nearly 40% of all farms (Statistik Austria, 2016), there is an interest for politics to pay close attention to the interests. The high affinity of politics to the livestock sector is also represented in the following statement: „I would say, that politics on state and federal level listens to us [...] there is a high affinity towards us and this is also reciprocated, that the pork farmers, and generally all husbandry farmers, are kept happy so to say” (I10)

Being in an established and dominant position, a central strategy of this project is to play on time and defend the current accumulation regime and mode of regulation. This became evident through frequent referrals to change, reform, and regulation within the system coming with time or needing time (I9, I12). While some actors justified the need for time with the slow change of consumer preferences, others referred to the natural change of habits that comes with demographic change: „Time will bring the possibilities to intervene there, because, well I have to

say the older generation, so the typical meat-eaters and schnitzel-eaters, are dying out anyway.”
(I12)

Accumulation through Consumer Patriotism and Market Differentiation

The accumulation strategies of the dominant political project revolve around increasing consumer appreciation and willingness to pay for national meat products, market differentiation within Austria to stabilize production, and an export-oriented trade regime accompanied by the limit of imports. The call for more Austrian production is underlined discursively by frequent claims in the public space on the high quality of Austrian production, undifferentiated by the production form. This is also historically rooted in the framing of Austria as the ‘delicacy store’ of Europe by former Agricultural Minister and EU commissioner Franz Fischler, which has been continued by subsequent agricultural representatives (c.f. BML, 2021). The project draws upon discursive resources such as the appeal to consumer patriotism as a direct method for protecting farmers' livelihoods, rural landscapes and by framing imported products with a veil of opacity (I8, I12). By communicating this information, the aim is to increase consumers' appreciation and willingness to pay, enabling higher profits for producers (I8). This strategy is criticized by actors outside of the project for concealing efforts to reduce meat production, as all consumption of national production is given a positive connotation (I3, I4, I6).

Varying demands of the Austrian consumers are to be met with a highly differentiated market, serving to all tastes and preferences. The market differentiation of meat products is seen as an important method of counteracting trends of decreasing consumption, as can be seen in the following description of differentiation in the beef sector by an agricultural representative: *“classical Viennese cooked meat culture was revived, and with that, the per capita consumption could be stabilized, or rather currently with a slight increase”* (I9). A higher market differentiation also serves to remove producers from price pressure on the global market as they are no longer only producing commodities for prices set in relation to the global market. This strategy serves to generate advantages for local producers who are faced with difficult conditions in competing

with more cost-efficient production in other European countries which has become increasingly important through the common market within the EU (I9).

Next to higher prices for differentiated production on the national market, the dominant project also relies on export markets to secure profits in the face of increasingly concentrated national retail markets. This was brought to expression by a statement made by a food industry representative: *“We just have a retail concentration here in Austria like nowhere else, and businesses in Austria, especially in this industry only survive, when they look for other markets”* (I12). On the one hand, this concerns differentiated products serving to export images and memories associated with Austrian rural life. By stressing the importance and demand for these products in export markets (especially Germany which represents a large group of tourists), the project is providing the strategy of protecting national production with additional legitimacy. On the other hand, the project also uses an export-oriented accumulation strategy for undifferentiated conventional production and products that are no longer demanded in Austria (I9). For this, the project benefits from good trade relations with China and other Asian nations, where meat consumption is growing, while ecological and animal welfare concerns are not yet as central (I9, I12). Next to non-differentiated conventional production, these markets are especially important for selling remaining pieces of meat, that are culturally or seasonally no longer demanded in Austria.

Increasingly, the dominant project is pushing towards policies to stabilize demand for Austrian products within Austria where public procurement is seen as an important instrument. The action plan sustainable procurement (Aktionsplan Nachhaltige Beschaffung) was presented in 2021 containing rules and guidelines for money spent by state institutions (BMK, 2021). Centrally in the field of food procurement, this guideline defines the production standards, according to Austrian production. The importance of focusing on national production in this guideline is also pointed out by actors in the dominant project: *“there we created the possibility where we say quality from Austria has to be favored”* (I12).

Concerning the quantity of meat consumption, the guideline creates a basis for ensuring there is at least one vegetarian dish and refers to the already existing dietary guidelines for portion sizes.

State Strategies of Consumer Power and Demand Side Regulation

Next to playing on time, the dominant project follows a market-oriented state strategy, where consumer purchasing decisions are seen as the main driver of change. The central focus on consumer behavior is brought to expression by the following quote from an agricultural representative:

“There is also the area of, let’s say, consumer education, in the sense of “it’s the consumer, stupid”, so in the end, it always comes down to the fact that the consumer decides with his wallet in one direction or the other” (I9)

Information campaigns, education, and market transparency are seen as central and non-paternalistic measures to create a change in consumer habits towards more regional meat. The main toolbox for furthering the strategies of market differentiation, consumer information, and consumer patriotism is the AMAMarketing (I9) with its marketing campaigns and quality seal.

Concerning regulatory changes in production, the dominant project is reluctant towards increasing regulatory burdens such as higher production standards in terms of animal welfare. This is rooted in the fact that investments in agriculture frequently take many years to pay off (I12). Acceptance for regulatory measures exists when accompanied by government subsidies and changed consumer purchasing behavior with related price premiums (I12). There is a clear preference to use the AMAMarketing quality seal for increased production standards, rather than legal pathways through animal welfare laws. This enables production with lower standards to continue for export markets while keeping higher standards voluntary as described above. Additionally, the standards within the AMAMarketing seal are agreed upon by a close alliance of industry members.

Welcomed regulation by the dominant project includes laws concerning consumer transparency (in terms of origin) and public procurement guidelines, which both serve to generate a higher

demand for national production. A central political project for the actors within this political project is the origin labeling of foods sold in Austria. Mandatory origin labeling aligns with the accumulation strategy of promoting national production and consumption as well as the conviction of market-oriented measures appealing to consumer power. The focus on origin underlines the strategy of the dominant project to protect all national producers, without addressing the production standards. The ÖVP/Green coalition government program 2020-2024 defined a row of measures to improve voluntary origin labeling practices and also mandatory labeling for foods of animal origin in processed foods and public procurement (Bundeskanzleramt, 2020). While meat sold in food retail is, with a large majority, of Austrian origin, the situation in processed foods and gastronomy is less transparent. Origin labeling was also the most frequently named policy discussion concerning meat consumption (I2, I3, I5, I6, I8, I9, I11, I12).

The AMAMarketing as a Strategic-Structural and Organizational Resource

The AMAMarketing serves as the authority on marketing national production. With its quality seal, it also certifies the quality and production of national produce. As a legally backed food industry organization with the purpose of promoting agricultural products, the AMAMarketing acts as a central exchange platform for actors within the food system. As the financing is dominated by member fees from animal-producing sectors (mainly milk and pork), its marketing activities are skewed towards these products. The bundling of financial and personnel resources with marketing competence makes the AMAMarketing an organizational resource for the dominant political project. The AMAMarketing also has access to preferential rates for communicating in public media as it qualifies for the criteria of contributions in the service of the public (I8).

Standards of the AMAMarketing quality seals are, by law, required to be higher than legal standards and decided upon in regulatory bodies within the AMAMarketing. Actors in the dominant political projects frequently refer to the AMAMarketing bodies as representing a close alliance along the value chain (I9). This close alliance of actors within the AMAMarketing, as well

as their prominence and acceptance within the state, allows the actors to use the AMAMarketing as a strategic-structural resource that supports their interests, as can be seen in the following quote:

“through the proximity of the whole AMA quality seal system with the AMA Law etc. to politics, it is no coincidence that for example in the ÖPUL, where there is also an animal welfare chapter [...] that these [criteria] correspond with those, that are rewarded through the AMA quality seal ...” (I9)

This quote by an agricultural representative demonstrates how the AMAMarketing and its quality seals are closely intertwined with agricultural policies, in this case, the program for environment and agriculture (ÖPUL) which provides extra subsidies for initiatives of extensification. This indicates that state actors recognize standards set within the AMAMarketing bodies as accorded within the industry and thus an easy pathway for policy to follow. The AMAMarketing quality seal also represents an opportunity to nationalize Austrian standards within the framework of the EU common market bolstering national accumulation.

The perceived tendency for government to delegate higher standards to the AMAMarketing quality seals has also been criticized by social movements (Oekoreich, 2021). An example of this close relation and preference for voluntary regulation through the AMAMarketing quality seal occurred with the banning of the fully perforated flooring in pig farming. The demand to ban this production form came from the civil society referendum on animal welfare, the Tierschutzvolksbegehren, initiated in 2018 and presented in parliament in 2021. The AMAMarketing on the other hand introduced their ‘AMAMasterplan Schwein’ (Masterplan Pork) in 2021 aiming to strongly increase the number of pigs kept in better conditions. The masterplan also proclaims to remove fully perforated flooring from its standards by 2032. In July 2022, the government presented its animal welfare package to parliament including plans to outlaw the fully perforated flooring by 2039 (Parlament.gv.at, 2022). Yet, the policy package does not present an alternative but rather prescribes that until 2026, a joint project by the health and agricultural ministries should evaluate existing production forms as a foundation for the new regulation.

Protecting Rural Livelihoods and Economy

The dominant project draws upon discursive resources of stories and images of rural livelihoods, farmers, and animals, which they claim many consumers today no longer understand. This serves to increase support for their accumulation strategy of higher national consumption with higher prices. The dominant project discursively ties national products to desired images of the Austrian landscape (e.g., meadows, grazing cattle) drawing upon romanticized portrayals of rural life to justify the higher prices also aligning their production methods with surreal perceptions of agriculture. While the meat sector no longer puts an emphasis in advertising on the health benefits of animal protein, they are still able to benefit from historical slogans (I8). An example of a marketing campaign aimed at positioning meat with younger generations is the campaign 'meat does it' (Fleisch bringt's) shown in Figure 13, which positions meat consumption as a driver for strength and fitness and is still available on YouTube. Meat being central to fitness and health is also underlined with the slogan 'fit with meat' from 2014 (Figure 12).



Figure 13: Video campaign positioning meat as a driver for strength and fitness by AMAMarketing (taken from youtube .com via ortibus1983, 2009)



Figure 12: AMAMarketing campaign from 2014 positioning meat as a component of a healthy diet (Yumpu, 2014)

On the other hand, the dominant project also capitalizes on the assertion that agricultural production sets the table, ensures national food security, and stabilizes the rural economy (I10). The project's systemic resources are also demonstrated in the following quote from a representative of the pork sector:

“that the pork farmers, and generally all husbandry farmers, are kept happy so to say because politically, it is well known what it means if larger parts of livestock farming break away. It’s also about added value in the country, it has enormous economic implications” (I10)

While a study by Sinabell & Streicher (2020) finds that primary production comprises 30% of employment in some rural areas it also points to the decreasing economic contribution of the food industry in terms of added value and employment. The authors determine that this is nearly completely due to the decreasing relevance of the primary sector which is increasingly dependent on up- and down-stream businesses (idib. p. 9). While the economic relevance may be decreasing, actors in the project also refer to other systemic importance of the producing sector such as food security and the circular economy (I10). This provides their demands and extra weight by implying a lack of food, hunger, and unemployment if not adhered to. Actors outside of this project criticize that the discursive use of terms such as *productive* agriculture or *the* farmers excludes and devaluates agricultural producers outside the industrial model and reduces space for alternatives that also contribute to food security (I4).

A prominent materialization of this project’s strategies can be seen in the recently accepted CAP strategy plan. This plan outlines the aims and measures of agricultural policy in Austria for the coming 5 years (2023-2027). A high-priority goal (B17) of this strategic plan is defined to be the continuation and expansion of climate-friendly and area-adapted husbandry. The aim is to provide support for small-structured farms, which are not able to transform to more sustainable

husbandry practices as the current demand is not high enough to ensure *“that the production is economically possible for all farms”* (BMLRT, 2021a, p. 56). This is in line with the strategy of dominant actors in protecting livestock producers and ensuring the continuation of animal production systems, even when not economically feasible.

Divergence within the Dominant Project

The dominant project manages to unify a large group of actors behind market-oriented and patriotic strategies that would result in a stabilization and regionalization of meat consumption. While the large number of actors, the strategic-structural, discursive, and organizational power resources enable the project to successfully universalize its interests, the analysis showed variabilities within the project. A difference in vision was seen between the pork and the poultry sector. While both sectors in Austria are highly industrialized and, in contrast to beef, use only sparse regional differentiation, they are faced with very different production and consumption conditions, which is reflected in their strategies. Most noticeably, the consumption of poultry has been increasing due to easier preparation, the absence of religious restrictions, and health-related benefits (I11), while pork consumption is decreasing.

The pork sector in Austria follows a strongly commodity-oriented approach where production is bundled through the national pork exchange to coordinate and optimize profits (I9). This makes the pork sector highly vulnerable to global price fluctuations, any increase in national regulatory standards, would make Austrian pork less competitive on the international market. The accumulation strategy identified in the analysis was therefore centered around production and efficiency gains and nearly complete market liberalization (I10). This also allows the sector to profit from the growing demand for pork in other regions of the world, while it has been shrinking in Austria. State strategies of the sector were analyzed to be supportive of voluntary production regulations (such as through the AMAMarketing quality seal) but critical of state interventions in agricultural production referring to the need for the market and consumer prices to accurately reflect supply and demand conditions.

The poultry sector on the other hand is highly vertically integrated with widespread contract farming. The slaughterhouses provide the farmers with feed and input, there is also no centralized national or international exchange market for poultry meat. Additionally, with the banning of battery cages for laying hens in 2008, the poultry sector has already undergone a change process, which is retrospectively seen as positive by the interviewed actors inside and outside the sector (I4, I10). While the ban in Austria came at a time when cage farming was still legal in other European countries, it was possible to generate support for the measure resulting in a high proportion of national eggs in Austrian food retail and also set the building blocks for further initiatives towards high levels of transparency regarding production form and traceability (I9, I10). The generally more positive outlook for poultry consumption as well as the successful change process in the past support the identified strategies which are less reluctant to claim that lower meat consumption is generally required and less defensive against regulatory change in production (I10).

In summary, the dominant political project represents the conventional production regime drawing its power from historical dominance in structures and discourses that enable it to protect its position. Its vision regards meat consumption as a central part of diets and the agricultural landscape. The corresponding strategies do not challenge the high level of consumption but rather aim for the protection of national production by promoting national products. The dominance of this project is increasingly being challenged by alternative forms of production and consumption, frequently presented by civil society.

5.2.2. The Alternative Political project – Agricultural De-Intensification and Structural Reform

An alternative political project was identified in the analysis, driven by civil society, and focused on agricultural and structural reform. The alternative political project follows the vision of a shift away from intensive industrial agriculture, for the benefit of the environment, animal welfare, consumer health, and small-holder farmers that are currently disadvantaged by the dominant system. While the alternative project supports the trend promoted by the dominant project

towards more regional production and value chains, it also underlines the necessity for this to come with less intensive production patterns, reduced dependencies, more participation in the value chain and in politics. The alternative political project includes actors from civil society initiatives, internationally organized NGOs but also representatives of consumer protection. This political project serves to initiate and present alternatives that challenge the dominant project.

Disrupt Accumulation and Reduce Dependencies

The accumulation strategies of the alternative project aim for a disruption of the current, dominant forms of accumulation in agricultural and meat production. In the words of an NGO representative this entails animal products *“on the one hand, held under better conditions, and therefore more expensive and at the same time less”* (I14). Next to less meat being produced and consumed, the project proposes an alternative model of agricultural production: *“A shift away from intensive factory farming so to say, that would be a big point”* (I13). The alternative political project accommodates actors supporting vegan and vegetarian diets as well as others that simply call for less excessive consumption and production that is embedded in local nutrient cycles and suited to the location. Strategies aimed at transforming the current modes of production and consumption unite these actors with varying approaches to the product meat itself.

The alternative political project criticizes the current dependencies on global markets, powerful actors along the value chain, and uninformed consumers that enable the current modes of accumulation (I3, I4, I5). Alternatively, the project proposes shorter value chains with more territorial markets that allow for a closer relationship between producers and consumers (I5). This is brought to expression by a statement of a farmer shared by the representative of an international farmers organization: *“I want to be able to produce good food for the people in my surroundings”* (I3). This quote also demonstrates the criticism of the current distance between producing and consuming classes, where rural areas are increasingly producing food for frequently wealthier and urban consumers while suffering from structural change, outward migration of people, and value creation. The strategy of changing accumulation patterns also

includes criticisms of global trade relations and global commodity markets, which are seen as unsuitable for promoting ecologically and socially sustainable foods (I3).

Active State Regulation for Structural Change

Rather than seeing the main lever of change on the side of consumers, the alternative political project takes a more critical view of the structures enabling high meat consumption. Due to social disparities and the claimed current lack of transparency (I2), actors in the alternative political project reject the overriding responsibility that is given to consumers in choosing the 'right' products in everyday purchasing decisions, as is visible in the following quote by a representative of a consumer protection union: *"I think you have to look at the reality of people's lives and then say, ok, politics has to steer, not the single consumer"* (I6). Notwithstanding the importance of consumer education and transparency, actors in the alternative political project demand active state regulation to reduce the current dominance of 'cheap' meat (I2, I5, I7). Proposed regulations include limitations on the amount of meat produced (I3), an increase in animal welfare regulations (I4), a change in subsidy schemes to guide investments towards more animal-friendly, extensive production systems (I4, I6) as well as regulation of marketing activities (I5, I6, I7). Especially the high level of marketing for meat in Austria was seen as critical, given the necessary shift to reduce meat consumption: *"that's the question, if it makes sense to even advertise meat, [...] Why do you have to advertise for a product that's consumed too much anyway"* (I6).

Due to the aim of reducing dependencies and fostering diversity, the actors in the alternative political project also follow a strategy of more participatory agricultural and food politics, as stated by the representative of an international farmers organization: *"there are different systems we could learn from that include a form of democratic regulation, so where different actors are included, different actors in society"* (I3). The call for more participatory regulation also includes criticisms of the dominant regime, where powerful actors such as the formal agricultural representation have historically overshadowed agricultural policy-making in Austria and led to

some actors feeling under or misrepresented. This is also reflected in the perceived requirement to be active in agriculture to credibly join the discussion on agricultural politics (I13).

Discursive Resources to Initiate Disruption

The alternative political project builds its strategies on discursive and ideological resources placing alternative forms of production and consumption in the public sphere. By creating a discourse around alternatives, the alternative project plays a vital role in challenging the universalization of the dominant strategies. Centrally, the alternative political project picks up on those aspects of the dominant system, that fail to address public concerns and provide an alternative vision and narrative. This role is also expressed in the statement by the representative of an international farmer organization concerning social movements and initiatives that try to think outside the conventional system: *“Those are places where a lot is created and where new possibilities are also made visible”* (I2).

Challenging the messages of the dominant project around animal welfare and sustainable production, the alternative project uses shocking images and stories of the production system to reveal inconsistencies and on-the-ground implications of regulations. Especially images of pork farming on fully perforated floors have been used as a resource to highlight the inadequacy of current regulation and enforcement to fulfill animal welfare requirements as is highlighted in the following quote by an animal welfare NGO: *“And of course, there are scandals where things are illegal, but the real scandal is actually what is still legal”* (I4). In contrast to these images, the actors in the alternative project create alternative narratives of animal welfare and rural livelihoods to support the strategy of disrupting the intensive production systems. These narratives serve to portray *„what the animal would actually need and then how far away the status quo is from that”* (I4). The building of these narratives relies on shifting the perspective from economic growth to the individual animal (I4) or farm level (I2) and delegitimizes the dominant conventional production system. By creating these spaces and narratives, the alternative project is able to align with and increase discontent in the public concerning profit-

driven production systems, of which the planetary and human costs have become increasingly evident.

Increasing Organizational and Structural Resources

The discursive resources of the alternative project are complemented by a high level of competence, finances, and networks regarding communication in various forms of media. Press conferences, social media, and other forms of public media were identified as key instruments for actors in the political project to communicate. Frequently actors in the project cooperated in individual policy initiatives creating synergies between the different areas of focus such as environmental, and social concerns for example in criticizing the national CAP Strategic plan (I6). Increasingly actors in the alternative project have also become involved in research activities, collaborating closely with research institutions and critical science to generate better knowledge of the current costs of production and the feasibility of alternatives (I5, I16).

Through the interviews, it became evident that to a certain extent, there is a lack of organizational resources. On the one hand, actors in civil society, frequently financed through donations, are competing against each other for financing and awareness (I4) and can thus weaken the position of the project. Additionally, due to the strategy of challenging current efficiency-driven forms of accumulation, often living in alternative production systems, actors are to some extent structurally disadvantaged. This was stated to lead to an inability or difficulty in assuming representative functions:

“Those that are there daily for the animals, they have a lot of work that is undervalued but which is a resource for offsetting disadvantages, by just putting more work into it, but that has immediate effects on the representation, they can’t just drive to Vienna for a discussion” (I3)

The alternative political project is also challenged by a deficit in national structural resources. This was made visible through actors criticizing the non-binding nature of frameworks that support their strategies. For example, while Austria follows a ‘health in all policies’ approach,

which can lead to an integration of nutrition requirements in agricultural politics, the enforcement of this approach is lacking, and the responsibility is delegated to the individual ministries (I7). Also, in the case of animal welfare, while institutions such as the animal welfare council (Tierschutzrat) and Animal Ombudspersons have been created to protect the rights of animals in legal disputes, these remain weak in terms of status and financing (I4). On the other side, the alternative development can call upon supra-national institutions and guidelines as a structural resource for their strategies, albeit many of these remain very weak as they are frequently not legally binding. International bodies such as the FAO, WHO, and the UN provide an internationally recognized body of knowledge and expertise, often also making policy proposals or providing advice to achieve global goals. Through being a member of these organizations and having subscribed to their joint aims, actors in the alternative political project can call upon an institutional responsibility for Austria to play its part. One example of this was a proposal to limit marketing to children along a nutritional profile adapted from a WHO. This would have limited advertising of processed meats to children due to the high fat and salt content. While a case could be built for the adoption of such a limitation grounded in international expertise, the proposal was promptly rejected nationally (I7).

In the analysis, it became evident that the alternative political project has, just in recent years, gained momentum through an increase in organizational and structural resources. The Green Party, which joined the Austrian government in 2019, is seen as a party that is historically close to civil society and environmental NGOs and has increased the representation of these groups in ministerial bodies (I4, I5). This has provided the alternative political project with organizational resources that allow it to position its strategies. For example, actors state that in the National Commission on Nutrition which consults the Health Ministry, *“there is also a person from the vegan society [...] that’s a big progress, it is also a green ministry”* (I5). A representative of an environmental NGO also now has a seat. Actors also pointed to the role of sub-national initiatives in involving civil society actors, such as in the city of Vienna in the creation of a municipal food strategy (I3).

Furthermore, the close relation to Germany as the largest export market is also serving as a structural resource. As Germany currently has a green agricultural minister, who has prioritized topics such as animal welfare labeling, this is also providing momentum to the project in Austria. The implementation in Germany is seen as a window of opportunity by actors within the alternative project hoping that it will ease the way for adoption in Austria: *“Germany now, for example, [...] has a green agricultural minister, this creates a lot of opportunities ...”* (I3). In fact, discussions around an animal welfare label have been reignited in Austria aided by a commitment for implementation first by German retail chains and followed by the German agricultural minister (Die Presse, 2022).

The Animal Welfare Referendum as a Bridge to the Dominant Regime

Some actors in the alternative political project also further the strategies by building on networks with the dominant project and positioning individual political initiatives. This became especially evident with the Animal Welfare Referendum initiated in 2018 and submitted to parliament with over 400,000 signatures in 2021. Documentation from parliamentary discussions suggest that the referendum has been an important factor in pushing demands for a move away from fully perforated flooring and origin labeling (Parlament.gv.at, 2022). While the demands of the referendum were initially formulated with other civil society actors and NGOs, by the time it became a referendum it had moved towards partnering with food industry actors and agricultural representation on the side of the dominant project. For example, GourmetFein, a large, conventional meat processor, was the main sponsor towards the end of the referendum. The initiative soon distanced itself from NGOs and was able to use its perceived independence as an organizational resource to win signatories in rural areas and outside of the typical NGO ‘scene’ (I2). Additionally, the referendum drew on discursive resources of relatability and avoided the demand of reducing meat consumption to break out of the niche which animal rights and animal welfare activists are frequently put in (I2).

The civil society initiative wielded systemic power with a high level of support already before it became a referendum. This, along with personal networks and knowledge about the political

system (organizational resources), allowed it to place animal welfare demands in the parties and government program after the reelection in 2019 since they: *“were representing a large number of people and had awareness, they [the political parties] suddenly also open for animal welfare topics”* (I2). Over 400,000 signatories supporting its demands proved to be valuable to exert pressure on the national government aiding in the acceptance of the animal welfare policy package (Parlament.gv.at, 2022) and the development of regulation drafts for the origin label (I9) in 2022.

Other examples of civil society actors cooperating with dominant actors also exist and have been important for furthering individual initiatives. The previously mentioned move to ban cage farms for chickens is another example that is retrospectively seen as a project where NGOs and civil society cooperated. Moreover, actors of the dominant project also stated that they see NGOs as important actors for increasing political pressure in their political projects, for example when it comes to the execution and enforcement of the public procurement sustainability guidelines (I11).

5.2.3. The Incorporating Political project – Retail Integration and Consumerism

The visions of the dominant and the alternative development model are increasingly being incorporated by a third, retail-driven political project. This project is characterized by a vision of consumer power, where all alternatives are offered for consumers to choose from. This is made visible in the following statement by a food retail representative: *“Well, the food retail is in many ways simply a mirror of society. We have the assortment that the consumers buy”* (I13).

To achieve this vision of being able to offer all that the consumers wish to buy; the incorporating political project follows an accumulation strategy of market liberalization. This serves to increase product variability and choice enabling the introduction of new alternatives, which may be able to generate higher returns. The vision of this project in Austria currently includes a shift away from industrial, conventional agriculture, as this is what is claimed to be demanded on the markets: *“We know and we can see that exactly this agriculture [conventional] is increasingly*

coming under pressure and that they should actually be brought to produce differently, more in line with the market” (I13).

Rather than formulating a vision, the above quote also underlines that this project bases its strategies on the idea of a perfectly functioning market. The market-oriented accumulation strategy of the project is justified discursively by claiming to prevent paternalistic measures. An example of this concerns a proposed limit to price promotions, which actors in the project rejected in the name of protecting the right to meat and enabling an *“autonomous consumer decision”* (Will, R. in Handelsverband, 2019). Using this argumentation builds on the already polarized public discourse around policy measures addressing meat consumption. In this discourse, any attempt to break the dominance of cheap meat is considered infantilizing and reduces consumer freedom. Moreover, despite its practices of price reductions being heavily criticized by meat producers, the incorporating project aligns with the discursive resources of the dominant project by arguing that its use of price premiums protects from imports (a regulation of price actions on national products would make imports more attractive to consumers) (Handelsverband, 2019).

Additionally, the incorporating project follows a strategy of vertical integration, with which it is increasingly incorporating upstream aspects of production into its own business. This means retail chains are not only involved in the sale of foods but increasingly also in processing. For example, one of the largest meat processors in Austria is owned by the SPAR retail chain. Similarly, retail chains have been among the first to integrate alternative proteins into their retail brands (I13). The interviews revealed that the desire to integrate upstream processes also stemmed from the fact that agricultural production did not suit the vision of the retail chain or was too slow in transitioning to be more ‘market-oriented’. This is expressed by a representative of a retail chain claiming that *“the demand is increasing rapidly, and we can’t even cover it, so there would be music there and we could still do a lot there. Agriculture is just a little sluggish there”* (I13). The representative further explains that they are thus *“trying to go [their] own way with suppliers”* (I13). Food retailers are increasingly forming separate contracts and creating their

own projects to produce meat with higher animal welfare rather than waiting for a change in national regulation or funding schemes.

Actors in the incorporating political project generally follow a strategy of keeping regulation voluntary. There is a concern, that overburdening regulation will make it more difficult to quickly react to consumer demands, provide the full palette of products to consumers and disadvantage Austrian businesses in the European common market. Not just a disadvantage in the European market is a concern, but also a disadvantage between sectors nationally. On the one hand actors in food retail support regulatory measures that increase consumer transparency (such as the origin and animal welfare labeling) due to the high proportion of Austrian products already sold here (Handelsverband, 2022), concerning this political project, there is also a strategy in arguing for equal regulation across all sectors. Similar to the dominant project, actors in the incorporating project call upon existing voluntary measures such as the AMA quality seal and the AMA Culinary Network (AMA GenussRegion) as effective instruments for accommodating change in the sector, which is not disruptive to the current forms of consumption and production (news.wko.at, 2021). In line with the strategy of vertical integration, this allows the project to go its own way and react flexibly to changing supply and demand.

The incorporating project has been able to profit from the visions of both other projects providing a high proportion of regional products and quickly adding organic production or alternative proteins into its assortment (I13).

Economic Concentration as a Systemic Resource

The incorporating project advances its strategies due to systemic resources given through a high level of economic concentration. While over 90% of food purchases are made in food retail, this is dominated by only 4 chains, which are in close competition with each other. The economic power of the retail chains was frequently cited as a central challenge for generating higher incomes on the producing side (I8, I11, I12). With little choice between the 4 powerful retail chains and an overproduction of some meat products (I12), producers are forced to accept the

low prices and the associated requirements. The use of retail brands, which are sold in lower price segments, was also stated to generate extra competition on the market and increase the pressure on producers (I12). Additionally, the high density of retail stores leads to increased choice for consumers making it necessary to develop incentives that frequently result in cheap meat being used as bait. This results in the high level of price actions that are frequently criticized to be depressing to the real value associated with meat (I12).

The incorporating project also draws upon organizational resources as it is well connected with both other projects, which aids in the incorporation of different pathways. On the one hand, retail chains and the chamber of commerce are represented in the bodies of the AMAMarketing where they can align their strategy with the current demands and requirements of the producing sector (I13). On the other hand, the project also cooperates closely with NGOs when it comes to incorporating new alternative products apart from mainstream production (I5). Being large corporations, the representative of the food retail chain also states that they have direct contact to representatives in all ministries, and frequent exchange on various topics (I13). While no interview was conducted with the gastronomy sector, this actor also builds on systemic resources, stemming from its high relevance in the rural and tourism-oriented economy. This has led to gastronomy largely being exempted from labeling requirements in the coalition government program on the one hand and also in the proposed regulations submitted in 2022 (Bundeskanzleramt, 2020; Koch, 2022).

The incorporating project serves as the main axis to the consumer and increasingly becoming involved in upstream processes. Actors in the project can profit from incorporating strategies of the other two projects positioning patriotic consumption and green alternatives at the forefront of their selections. In this way, the incorporating project can benefit especially from discursive resources built up in the other projects while remaining in an unchallenged and powerful position concerning the sale and distribution of meat.

6. Discussion and Conclusion

Food systems transformation for sustainable development requires a decrease in meat consumption in overconsuming countries. While a change in dietary habits is often attributed to individual consumer responsibility, more widespread actions are necessary to enact sufficient change in the face of climate change, environmental degradation, and global health challenges. Yet, addressing meat consumption is proving to be a challenge due to institutional power relations within the system. This analysis provides a country-specific insight into the political challenges associated with a change in meat consumption as a key to food systems transformation.

The above analysis of the contested nature of meat consumption in Austria indicates three political projects. The historical dominance of the producing sector had, and still has, strong influence on agricultural policies while food policies generally remain in the form of guidelines. Especially animal products and meat have been linked to national patriotism, the protection of cultural landscape, and rural livelihoods. The main instrument for this has been the AMA quality seal and the AMAMarketing which pools marketing resources and provides the dominant project with a strong structural resource for realizing its strategies within the state. The concerns of environmental health and animal welfare are addressed by associating imports with lower standards, thus bolstering, and justifying high national production. While the alternative political project is gaining momentum in challenging the prevalence of meat with increasing structural resources, this has not yet led to the adoption of concrete political measures or aims to reduce meat consumption or production (c.f. Bergthaler, 2021). Rather, the discursive power of the dominant project overshadows the calls for dietary change. Additionally, both projects are exposed to incorporation into a corporate, retail-driven project which utilizes its systemic power to profit from both pathways. The result is a focus on state policies that are closely aligned with vested interests in the producing sector, making livestock systems slow to transform. Food retail

has the systemic and organizational power resources to quickly adopt alternative innovations while simultaneously depressing the prices of meat products.

Faced with the need to reduce meat consumption in overconsuming countries, understanding the variety of interests and strategies regarding the change in meat consumption can help to understand the political challenges of change. Summarizing a special issue on the political economy of food systems, Baker et al. (2021) identify a shift of power in food systems in four directions; upwards to transnational food corporations, downwards with a growing importance of subnational actors, inwards with a process of concentration increasing corporate power and outwards with an increasing role of actors that are promoting market-oriented and multistakeholder governance. The trend of shifting power inwards through the concentration of corporate food retailers is also evident in this analysis with a high concentration in Austrian food retailing and increasing vertical integration by the retail chains. Sievert et al. (2020) also identify a recurring theme of power through industrial concentration within the meat sector. Concentration in the retail sector drives prices down for consumers and pressures producers to deliver at lower prices or risk being unlisted. This pressure on the prices, along with frequent price reductions due to the oversupply of certain cuts, further perpetuates high meat consumption (Sievert et al., 2020). The systemic power of the retailers provided by market concentration not only gives them leverage over meat production but also on policy processes favoring 'personal responsibility' and 'consumer choice' approaches. This can be seen in the focus of Austrian policies on labeling and consumer information measures (proposed origin and animal welfare labeling in food retail). Additionally, this is facilitated by the market-oriented logic and focus on consumer power of the dominant, production-driven project.

The increasing power of the corporate sector in Austria is a characteristic of the corporate food regime (McMichael, 2009). In an analysis of changing consumer-producer relations and the organic food movement in Austria, Markus Schermer (2015) also identifies the move from a productivist second food regime, oriented towards producing large amounts of food in production sectors that are spatially and discursively separated from the consumers, towards a

growing incorporation into the corporate sphere. Schermer argues that the “*images [of local traceability as a sign of quality] have become part of the existing corporate structures of processing and marketing*” (ibid., p. 129) preventing the development of alternative channels with changed consumer-producer relations. According to Schermer, supermarkets in Austria have been successful in managing the contradiction between demand for green, organic, local production and a globalized market central to the corporate food regime. Austrian supermarket chains are promoting the image of *food from somewhere*, which are products closely associated with a location and production form while selling much more *food from nowhere* but removing it from the public image. Through the fast adoption of strategies from organic and alternative marketing channels, or “*neoliberal appropriation*” (Schermer, 2015, p.130), the retail chains have managed to remain unchallenged in their power and domination making up 90% of the value in food sales in 2018 (AMAMarketing, n.d.). While incorporating patriotic consumption, alternative production forms, and alternative proteins, economic efficiency and rationalization remain within the retail-driven political project.

Campbell (2009) also highlights the tension between the critique of consumption patterns by social movements and corporate appropriation of these as the main dynamic in the corporate food regime. Similarly, the incorporating dynamic of the third political project remains criticized but unchallenged by both the dominant and the alternative political projects. Instead, the dominant project orients itself towards export markets for undifferentiated and excess products that are no longer demanded in Austria rather than formulating methods to disrupt the power of the corporate sector. The neoliberal doctrine of the market over state distinctive for the corporate food regime is advanced by the dominant and the incorporating project. The power of these two political projects serves to position and strengthen the corporate food regime in the Austrian state.

Similar to the results of this analysis, in their narrative literature review, Sievert et al. (2020) determine that the meat industry (from inputs to production, processing, and retail) has the most instrumental power, which includes resources for lobbying, personal relations and financial

donations to policymakers or sponsoring of knowledge creation. While this review uses a different systematization, the actors of the meat industry defined by Sievert et al. have an overlap with the dominant and incorporating political projects. Also, the instrumental resources defined by Sievert et al. (2020) correspond to organizational resources. In their reviews, Sievert et al. (2020) stress that while civil society is important in positioning alternatives and regulatory proposals, Big Meat and Big Food utilize their disproportionate organizational and especially financial resources to maintain a policy environment conducive to their form of production and accumulation. The adoption of the origin label is exemplary for this as it protects national accumulation undifferentiated by the production system. While consumer transparency is generally welcomed, also by actors in the alternative political project, there is a risk that increased marketing of national, 'better' meat may actually lead to increased consumption as was also pointed out by Dixon & Blanwell (2012) and Trewern et al. (2022). Looking at the promotion of 'less and better meat' as a policy framework for reducing meat consumption, Trewern (2022) also determines that the lack of a shared definition concerning 'better' meat can lead to the term being appropriated by dominant regime actors for their interests. More progressive regulatory proposals proposed by the alternative political project such as animal welfare labeling and a move away from fully perforated flooring have started to show some success in Austria facilitated by increasing systemic resources of the project and individual actors building a bridge towards the dominant project.

6.1. Way Forward and Niches of Change

Sustainable food systems require actions by a multitude of actors from private to public, large and small. In analyzing different pathways for dietary change in meat consumption, Wellesley et al. (2015) highlight that governments play an important part in leading the way in dietary change as relying on the market does not create enough incentives to reduce consumption or supply. Additionally, looking at the UK, Brazil, and China, they argue that the governments tend to overestimate the role of public backlash and that public belief that government should lead efforts in addressing sustainable meat consumption, is actually widespread (Wellesley et al., 2015).

Roux et al. (2022) point out that while similar reductions of environmental pressure can be achieved through measures on the supply and demand side, both are necessary to prevent spill-over effects. A reduction of production without curbing consumption will lead to a higher level of imports and increase pressure on foreign ecosystems, while a reduction in consumption without reducing production will maintain exports and fail to reduce ecological impacts on domestic ecosystems. Considering political feasibility, Trewern et al. (2022) find that actors in the UK deem production-side measures to be more feasible given the prevalent neo-liberal politics. They also point out that incremental changes to ‘better’ production patterns represent a path of less resistance considering that the agricultural sector already has a variety of support and investment measures in place. This also corresponds to findings by Wellesley et al. (2015) who found no measures addressing the demand for meat and pointed out that governments prefer to target production.

Sievert et al. (2020) note that public procurement is one opportunity for institutionalized reduction of meat consumption. Stating that *“Government and civil society can use procurement policy to challenge the power of industry by being role models as well as reducing demand for RPM [red and processed meat] production and consumption”* (Sievert et al., 2020, p. 9f). In Austria this is also visible through the implementation of a national sustainable procurement guideline addressing state bodies. Yet, to what extent this addresses the high meat consumption remains unclear as it refers to the already existing dietary guidelines and ensures only the presence of one vegetarian dish. More centrally, the guideline describes the necessity of products to have Austrian production standards, in line with the strategies of the dominant project.

A further opportunity for change exists in the shift in power downward to the sub-national level as determined by Baker & Demaio (2019). They identify that sub-national actors (city and municipal governments) are taking more prominent roles in active food governance predicting that this will become more important as cities continue to grow and become centers of economic and political power. This can also be seen in Austria where local initiatives such as the city of

Vienna have taken more progressive approaches to participatory food policy such as the Round Table on Environment and Animal Welfare or in adopting a public procurement guideline that states a reduction of meat (see Bergthaler, 2021). The increasing power over food systems in urban areas raises questions about how food systems that historically rely on surrounding rural areas will be structured. The subnational level is also a space where actors of the alternative political project have been gaining increasing traction making subnational policy actors important enablers for the alternative strategies.

The literature review by Sievert et al also reveals that governments, inter-governmental organizations (FAO, WHO, IPCC), and some non-governmental organizations may come into the role of enabling actors. While supra-national actors were not identified to have a strong influence on national meat consumption in the analysis, they were identified as a structural power resource, being referred to and called upon by actors wanting to induce a change. Organizations such as the WHO, UN, or FAO provide a body of knowledge, expertise, and authority that can be instrumentalized to persuade government into action. In some cases, the references were also made towards concrete guidelines, where the national government could align national policy with an internationally set standard (e.g., following the WHO proposed nutritional profile for marketing to children).

6.2. Reflections on the Research and Analysis Process and Further Questions

While the abstraction of political projects provides a useful tool for identifying directions of power and alliances, it overshadows some of the complexity and conflicts within the projects. Sites, where conflicts and cracks appear, are also those where opportunities for change can occur or where powerful actors align behind a different political project. Due to the constraint within a master thesis, it was not possible to offer a comprehensive analysis of all of these conflicts, this opens an area for further research. For example, what dynamics exist within the incorporating development where private actors are also competing against each other for profits (e.g., retail and gastronomy)? Given the role of this project in strengthening the corporate food regime within the nation-state, further analysis of these dynamics may contribute to a better

understanding of food regime transitions. Additionally, due to the national focus, the role of international actors and power structures came short. This could be addressed by including actors from the supra-national level in the interview partners. Another further research question concerns the shift of power in food systems from rural to urban and national to subnational levels.

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Appendix

General interview questions, more concrete sub-questions were prepared for each interview.

The interviews were conducted in German, a translation is offered in *italics*.

- Wie sollte Ihrer Meinung nach der Fleischkonsum in Österreich 2050 aussehen, und wie kommen wir dahin? *In your opinion, what should meat consumption in Austria look like in 2050, and how do we get there?*
- Welche Player sind relevant, wenn es um Fleischkonsum und Produktion in Österreich geht? *What players are relevant when it comes to meat consumption and production in Austria?*
- Welche Rolle spielt staatliche Regulierung in der Produktion und Vermarktung von Fleisch in Österreich? *What role does state regulation in production and marketing of meat in Austria?*
- Was waren in den letzten Jahren relevante Politikdiskussionen, Gesetzesvorhaben zu Produktions- und Konsummustern in Österreich, oder auch welche konkreten Gesetze wurden umgesetzt? *In the last years, what were relevant political discussions, regulatory proposals for production and consumption patterns in Austria, or what concrete regulations were implemented?*
 - Wie wird der politische Diskussionsprozess organisiert? *How is the political discussion organized?*
 - In welchen Prozessen waren Sie involviert? *In which process were you involved?*
- Welche Möglichkeiten sehen Sie, um Ihre Anliegen erfolgreich durchzusetzen? *What possibilities do you see to further your interests?*
- Haben Sie in dem Anliegen mit weiteren Akteuren zusammengearbeitet? *Did you cooperate with other actors to further your interests?*

Affidavit

I hereby declare that I am the sole author of this work. No assistance other than that which is permitted has been used. Ideas and quotes taken directly or indirectly from other sources are identified as such. This written work has not yet been submitted in any part.

Vienna, 15.12.2022, Charlotte Voigt