



ANIMAL WELFARE: A CONSUMER'S PERSPECTIVE

*Do Vietnamese consumers care about
animal welfare?*

A CASE STUDY BY



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HealthyFarm®



PREPARED FOR
World Animal Protection

PREPARED BY
Dr. Kasia Weina and Ms. Hieu Le

Evergreen Labs Advisory Company Limited / Evergreen Social Ventures
Công ty TNHH Tư Vấn Mãi Mãi Xanh/ Công ty TNHH Evergreen Social Ventures
No. 73 Pham Tuan Tai Street, Khue My Ward, Ngu Hanh Son District, Danang, Vietnam

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ABOUT THIS CASE STUDY

The study was conducted as a part of Humane Egg Market Development - a two-year project initiated by Evergreen Social Ventures under the HealthyFarm brand and sponsored by World Animal Protection.

The three objectives of the project are: (1) to evaluate and increase demand for humane eggs in Vietnam, (2) to increase the competitiveness of humane egg products while increasing and maintaining supply (3) to raise awareness about animal welfare and advocate with governments on implementing a local cage-free standard. The report is a core foundation activity within the third project objective to lay the foundation for later consumer awareness-raising activities such as offline events and online campaigns.

This study was conducted to determine consumer concern and knowledge regarding laying hens' welfare and willingness to pay for humane eggs. The focus of the study was the consumers in Vietnam. This study sampled and analyzed 323 consumers in Hanoi, Danang, and Ho Chi Minh City.

EXECUTIVE SUMMARY

In recent years, the improvement of farm animal welfare, specifically for laying hens, has gained increasing public attention. While people in Western countries have become familiar with the topic, this is still a new concept in Southeast Asia, especially in Vietnam. This study aims to determine the Vietnam consumers' attitudes and knowledge about laying hen welfare, analyze the willingness to pay for animal welfare eggs and the factors influencing the purchasing decision.



1. Consumers who hold a strong attitude and higher knowledge score regarding laying hen welfare were willing to pay more for humanely-raised eggs.

In terms of attitude towards hen welfare, the majority of respondents had a strong mindset. They were concerned most about the overuse of antibiotics in caged systems. This study also found that free-range or cage-free eggs are becoming more popular, with 24% and 18% of consumers selecting those products. Consumers with the highest spending purchased herbal eggs at 57,000 VND per 10 eggs (\$2.40) compared to the other types. The results also demonstrated that the higher the knowledge score and the stronger the attitude, the higher the amount of consumers' willingness to pay for animal welfare eggs per transition to improvements for animal welfare standards across the country. Regulatory enhancements are necessary to shift industrial farming towards humane practices, improve farmers' knowledge, and give consumers transparency for more informed purchasing.



2. In general, Vietnamese consumers have a low level of animal and laying hen welfare knowledge.

The results showed a knowledge score of 3.06 ± 3.24 across Vietnamese consumers, indicating a low knowledge level regarding laying hen's welfare. Younger individuals, female, do not have children and pets, live in Ho Chi Minh City or Danang, and those working in the non-agriculture field have higher knowledge scores. These initial findings suggest the necessity to organize targeted awareness campaigns to educate consumers about hens welfare, specifically towards younger citizens and pro-animal welfare consumers who are the main drivers of the food market in the future.



3. Vietnamese consumers are willing to pay more for humane products with clear labeling.

Most of the respondents were willing to pay more for different egg attributes. The most common egg attribute impacting consumer preference was 'eggs with the same nutrition value but with clear labeling that laying hens are treated humanely.' Younger individuals, people living in Ho Chi Minh City, vegans, vegetarians, and consumers concerned about food safety were willing to pay more. This result indicates that consumers would make conscious decisions if labeling were more transparent. Therefore lawmakers and certifying bodies must step in to improve animal welfare standards. These standards should be crafted closely with animal welfare experts, and the final result should be a trusted certification for producers that consumers can trust.



4. Vietnamese purchasing decisions are driven by nutritional concerns as well as negative environmental impacts.

As observed in other regional markets, this study confirmed that Vietnamese consumers also focus on food safety and health. In light of this, consumers are seeking products with better quality and products with sustainable supply chains. This positive result paves the way for future animal welfare and products to enter the market. However, humanely raised products must show clear product quality and nutrition improvements to trigger consumer purchasing.

This short study highlights that most of the consumers in Vietnam had strong attitudes towards welfare for laying hens. They were willing to pay more for eggs from better welfare farms. This positive result should trigger public sector stakeholders and other relevant organizations to work on improving animal welfare regulations in Vietnam and create a recognized standard for consumers to make well-informed purchasing decisions. Vietnamese consumers are aware of the harmful impacts of industrial farming on health and the environment; the time is now to transition towards a more just future for animal welfare and, in turn, our planet.



Vietnam consumers had **strong attitudes** regarding the welfare of laying hens and were **willing to pay more** for eggs from better welfare farms.

BACKGROUND

There has been a global shift towards improving supply chains, and in particular, countries are adopting more humane animal standards and practices to combat disease spread, enhance the quality of products, and provide equal treatment to all living things. Specifically for farm animals, mainly chickens, pigs, cows, and aquatic species, there has been noticeable progress in animal welfare standards. Recently, due to the COVID-19 pandemic, for farm animals specifically, these viruses can induce significant negative impacts on farm animals' health, well-being, and productivity ([Rodriguez-Morales et al., 2020](#)).

In recent years, the improvement of farm animal welfare, specifically for laying hens, has gained increasing public attention, especially in Western countries. Western governments have begun to adopt better standards; for instance, the UK and Australia have more progressive legislation in place ([Animal Welfare, 2013](#); [MCOP, 2020](#)).

In contrast with the West, people in Southeast Asia, including Vietnam, ignore how farm animals are treated. They are more concerned about health, safety, and nutrition while purchasing food ([Triwulandari et al., 2021](#); [Rezai et al., 2011](#); [Premashthira et al., 2022](#)). Southeast Asia governments have not yet observed a quick uptake of these new humane farming standards opposed to the West ([Murray et al., 2014](#)).

As observed in other Asian markets, Vietnamese consumers are increasingly concerned about health, wellness, nutrition, hygiene, and food safety. In research by Fi Global, 76% of Vietnamese consumers want to know everything that goes into their food, while 89% are willing to pay more for foods that claim health benefits ([Food Ingredients Vietnam, n.d.](#)).

This has led to increased purchasing of more nutritious food and organic products. In particular, regarding Vietnamese consumers' perceptions of organic foods, a 2012 study found that environment and nature, health and safety, nutrition, and accessibility directly impact purchasing ([Truong et al., 2012](#)). Specifically, health and safety were the most important factors affecting consumers' purchase propensity. It is important to note that a more recent or comprehensive study has not been done on consumer behavior, mainly gauged toward humane products and animal welfare.

Understanding willingness to pay is vital to strengthen the evidence for policy formulation in Vietnam and Southeast Asia. ([Clark et al., 2017](#))

Therefore, HealthyFarm- Happy Eggs conducted the study to provide a fresh look into the Vietnam consumer landscape regarding hen's welfare with **two following aims**:

1. **Determine the Vietnam consumers' knowledge and attitude about laying hen welfare.**
2. **Analyze the willingness to pay for animal welfare eggs and the factors influencing the purchasing decision.**

KEY INSIGHTS & FINDINGS

VIETNAMESE KNOWLEDGE LEVEL ABOUT LAYING HENS WELFARE

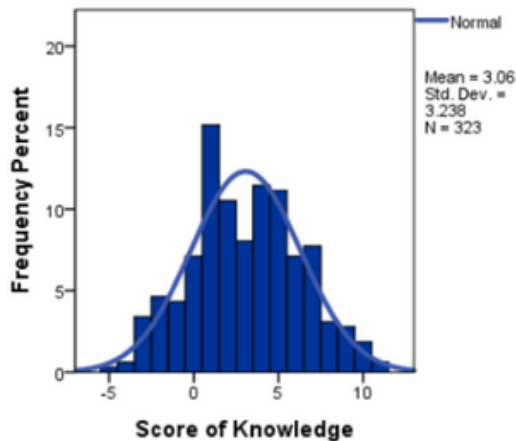


Figure 1. Distribution of knowledge score of Vietnamese consumers regarding animal welfare understanding.

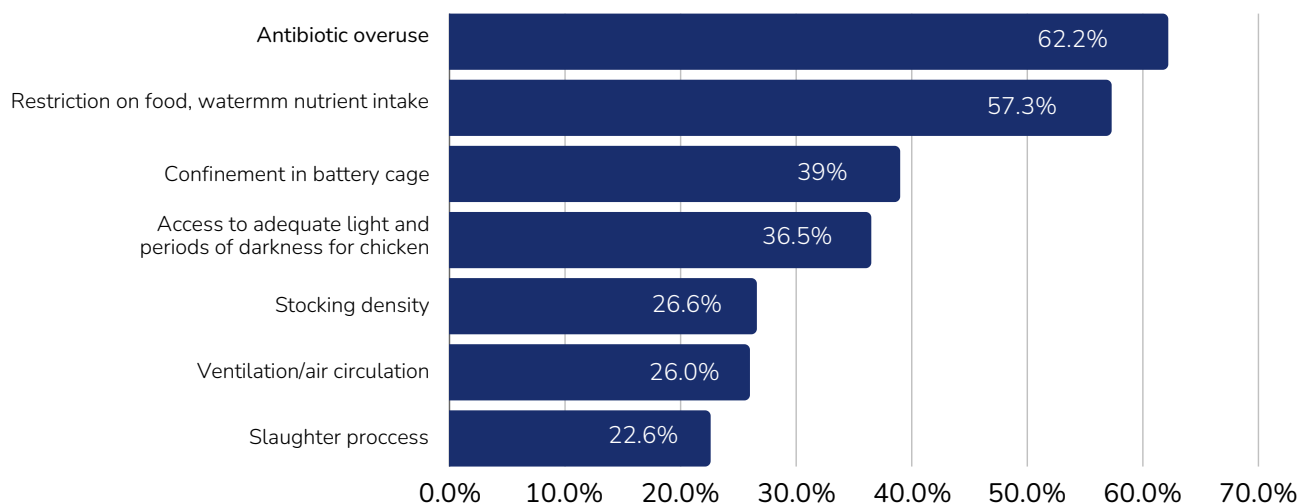
Overall, the result demonstrated that Vietnamese consumers' knowledge level regarding laying hens' welfare is shallow (Figure 1).

These results highlighted that younger females had higher knowledge scores than other respondents in the sample group. Individuals in Danang and Ho Chi Minh City reported a higher level of knowledge than people in Hanoi. Moreover, the result indicated that people having children or pets had lower knowledge scores. Interestingly, people working in agriculture displayed lower knowledge scores regarding welfare systems than respondents in the remaining group.

CONSUMERS' CHICKEN WELFARE CONCERNS IN VIETNAM

The top three rated concerns amongst consumers were the overuse of antibiotics (62.2%), improper supply of food, water, and nutrients (57.3%), and chicken's life in cages or not being free-range (39%) (Figure 2). It can also be noticed that the group of factors related to intake and antibiotics administration on laying hens received overwhelmingly more concerns than the remaining group of factors related to living conditions (i.e., confinement in a battery cage, stocking density, etc.).

Figure 2. Consumers' chicken welfare concerns in Vietnam



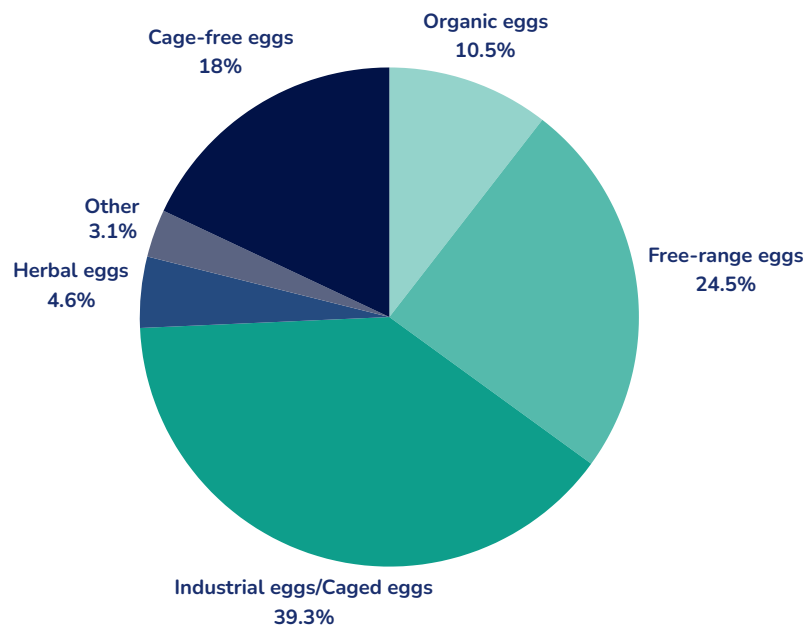
VIETNAMESE EGG CONSUMPTION BEHAVIOR

In Vietnam, various eggs on the market must be clearly defined or have detailed information about their production systems for the consumers to understand.

Consumers were asked about the current egg type they are purchasing, and the result showed that caged eggs (39%) and free-range eggs (24%) were preferred (Figure 3). The explanation for this result may be because the consumers may not be able to distinguish between cage-free eggs and free-range eggs in the actual market due to the lack of understanding of the different egg types as well as the poor product labeling

Additionally, in Vietnam, there is a common misconception that “free-range” eggs also include those hens that are running free around households or small communities. While generally, it is true that the hens do not live out their lives in cages, the standard of animal welfare and humane raising is not kept in such cases, including limited disease management, poor feed, etc. Only 18% of respondents chose cage-free eggs, while 9% consumed organic eggs. Herbal and other types of eggs were not popular, with low proportions of 4% and 2.7%, respectively (Figure 3).

Figure 3. Types of eggs being purchased by survey respondents



VIETNAMESE'S EGG CONSUMPTION BEHAVIOR

The survey asked about consumer habits when purchasing eggs to understand buying behavior more deeply.

The average Vietnamese consumer eats 2–4 eggs per week.

Regarding purchasing channels, they varied depending on the region. Respondents in Ha Noi tended to purchase eggs at traditional markets, while those in Danang usually bought eggs in grocery stores and mini-marts. Ho Chi Minh City consumers frequently purchased eggs in more modern channels such as supermarkets and food cooperatives.

Consumers were also asked about the current egg type they are purchasing. The result showed that caged eggs (39%) and free-range eggs (24%) were preferred. Only 18% of respondents chose cage-free eggs, while 9% consumed organic eggs. Herbal eggs and other types of eggs were not famous, with low proportions of 4% and 2.7% respectively.

Figure 4. Types of eggs being purchased by survey respondents



WILLINGNESS-TO-PAY AND FACTORS AFFECTING PURCHASING INTENTION

To assess the willingness-to-pay (WTP), the survey provided four distinct egg attributes that respondents stated they would be willing to pay more for those attributes

A majority of respondents were willing to pay more for eggs with the same nutrition value but with clear labeling that laying hens are treated humanely (43.7%)

Consumers who hold a strong attitude and higher knowledge score regarding laying hen welfare were willing to pay more for humanely-raised eggs

Older consumers, consumers in Ho Chi Minh City, vegans and vegetarians, and consumers concerned about food safety were willing to pay more for humanely-raised eggs

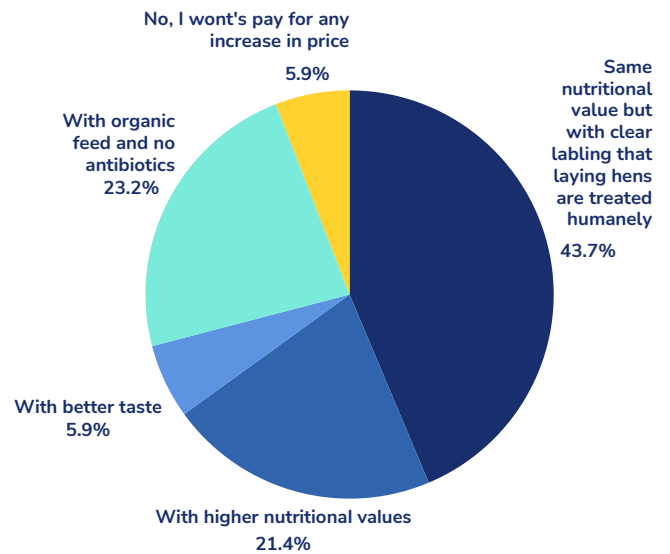


Figure 5. Percentage of attributes selected

WILLINGNESS-TO-PAY AND FACTORS AFFECTING PURCHASING INTENTION

To investigate consumer purchasing decisions, the survey spotlighted six factors influencing decision-making.

It is not surprising that price was a factor when consumers buy eggs (58%). The top three factors were price, environmental impact, and nutritional value. The highest proportion of respondents (69%) were concerned about nutritional value. Interestingly, two third of respondents (66%) expressed concern about environmental impacts.

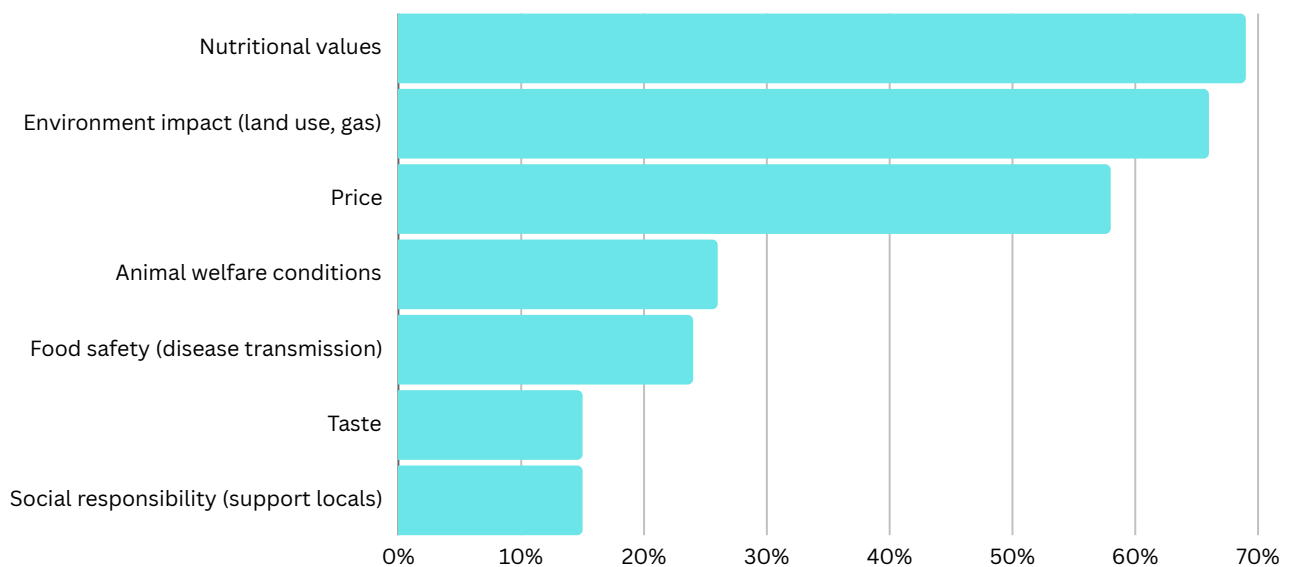


Figure 6. Factors affecting the purchasing decision

RECOMMENDATIONS

The future of animal welfare in Vietnam



1. There should be more awareness raising campaign for consumers in Vietnam

This research confirmed that *most Vietnamese consumers also have minimal knowledge about welfare for laying hens despite their strong attitude*. The firm attitude observed is assumed to stem from a moral rather than a knowledge perspective. In order to provide consumers with more knowledge to make informed decisions about purchasing eggs, it is essential to publish reliable animal welfare information through public awareness efforts in Vietnam. Additionally, proper, transparent labeling of egg categories will help consumers navigate between products and make more conscious purchasing decisions.

The findings suggest *the necessity to organize targeted awareness campaigns to educate consumers about hens welfare*, specifically towards younger citizens and pro-animal welfare consumers who are the main drivers of the food market in the future.



2. More stringent enforcement on the practice of antibiotics administration in laying hen farms should be carried out

Similar to consumers in other Southeast Asian countries, the health and nutrition trend can be confirmed among Vietnamese consumers. The research showed that *their biggest concern regarding egg production was the overuse of antibiotics*. This can explain the emergence of herbal eggs in Vietnam and the highest willingness to pay value for organic eggs with no hormones and antibiotics. *More stringent enforcement on the practice of antibiotics administration in laying hen farms should be carried out* to address this concern of consumers and protect the population's health. This enforcement will also have a critical influence on the overall welfare of farm animals in Vietnam



3. There is a need for further investigation into the relationships between intensive farming and environmental impact in Vietnam and why consumers are paying more attention to this topic.

Another interesting finding from this study is the growing public concern surrounding the environmental consequences of different egg productions. This can *suggest the need for further investigation into the relationships between intensive farming and ecological impact in Vietnam* and why consumers are paying more attention to this topic. The overall growing concern regarding the environment and sustainability gives hope for a more humane and environmentally conscious future.

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HealthyFarm®



CONTACT US

Office

73 Pham Tuan Tai, 2nd Floor, Khue My,
Ngu Hanh Son, Da Nang



+84 (0) 236 3912 686



info@healthyfarm.org



healthyfarm.org