



Meat politics. Analysing actors, strategies and power relations governing the meat regime in Austria

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ABSTRACT

Meat consumption is increasingly discussed as a key lever for reducing environmental and human health impacts within food systems. As in many high-income countries, meat consumption in Austria exceeds dietary and planetary-health recommendations. If, and how, to address overconsumption has become a site of political conflict. Calls for political measures toward sustainable dietary transitions make it important to consider the political economy of meat consumption and production in national contexts. It is thus important to understand the surrounding structures, institutions, and power relations. Using a theoretical approach grounded in food regime theory and critical state analysis, we shed light on important actors and power relations concerning meat production and consumption in Austria. Drawing on a qualitative analysis of interviews and documents, we identify three political projects competing for influence. A strong production driven project pushes to establish a regime of national consumption rather than addressing excessive production and consumption. A civil society driven project is gaining ground in challenging dominant forms of accumulation. In a third project, national producers and alternative production pathways are subject to an increasingly powerful corporate retail sector, which advances economic and increasingly ecologically oriented rationalization to increase profits. Strategies to challenge this corporate power have so far been sparse. Rather, the reproduction of consumer power and responsibility in the producing sector serves to strengthen this development as food retailers can effectively position themselves as custodians of the consumer. Active policies and willingness to accept the necessity for changing consumption are required to redistribute power.

1. Introduction

Meat consumption, especially overconsumption in high-income countries, has become a major issue of debate. Due to high ecological and social costs along the entire value chain – from feed production, livestock farming to consumption – research increasingly points to a reduction of meat consumption as an important lever to achieve global climate, sustainability and public health goals (Clark et al., 2020; IPCC, 2019; Mehrabi et al., 2020; Willett et al., 2019). The Farm to Fork (F2F) strategy by the European Commission, formulates the goal of “moving to a more plant-based diet with less red and processed meat” (European Commission, 2020, p. 14). Yet, so far, few political actions have addressed dietary change and policymakers often frame the challenge of reducing meat consumption as an individual consumer choice rather than an issue of public policy (APCC, 2018; WBAE, 2020). This consumer-driven narrative risks outrunning the limited time frame

remaining to counteract the climate crisis and ignores that reduced consumption alone will not be sufficient to prevent spillover of environmental costs (Roux et al., 2022). Additionally, the focus on consumer choice obscures the multitude of actors and power relations involved in shaping and maintaining meat production and consumption.

Due to powerful incumbent actors, vested interests, and high path dependencies, meat production and consumption are considered to be difficult to transform (IPES-Food, 2022; Penker et al., 2022; Pushkarev, 2021; Vallone and Lambin, 2023; Wellesley et al., 2015). To account for this, research has shifted focus from solely looking at consumer preferences, to consider the complex economic and political challenges associated with food systems transformation in general (Baker et al., 2021; Coulson and Milbourne, 2022; Dale, 2021) and meat consumption in particular (Ríos-Núñez and Coq-Huelva, 2015; Sievert et al., 2022). This research highlights the social, geopolitical, and material embeddedness of food systems. From this perspective, changes in dietary behaviour can

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be seen to be not only driven by consumer choice but influenced by political-economic structures, public policies, institutional rules, norms, and incentives at different scales (Dixon, 2009; Lamine and Marsden, 2023; Ríos-Núñez and Coq-Huelva, 2015; Vermeulen et al., 2020). This study contributes to this research and provides an analysis of the actors, strategies, and power relations that influence meat politics, i.e., the patterns of meat production and consumption in Austria.

Like in many high-income countries, there is an overconsumption of meat in Austria. While the Austrian Nutrition Society recommends an annual consumption of 30 kg per capita at most (AGES, 2022), annual consumption remained at above 60 kg and dropped slightly to 58.9 kg in 2021 (AMAINFO, 2021; Statistik Austria, 2022). The EAT-Lancet even proposes a reduction to 20 kg at most in order to stay within planetary boundaries (Willett et al., 2019). With a tradition of livestock farming, meat consumption in Austria is closely linked to the preservation of national identity. During the COVID-19 pandemic, news of regulating entry to restaurants based on vaccination or recovery status prompted a “Schnitzel-panic” (Der Spiegel, 2021). The Viennese Schnitzel (originally with veal but frequently made from pork) is frequently framed as part of the Austrian identity. For example, in response to policy discussions in Germany regarding an increase in the value-added tax on meat products in 2019, many political parties in Austria aligned to declare the Schnitzel a fundamental right (Konzett, 2019).

The availability of meat, especially cheap meat, has played an important role in stabilising and legitimising the global food regime (Langthaler, 2016). This article aims to contribute to a better understanding of how this process of legitimization and stabilization occurs at the national level. Our analysis is guided by three central research questions: First, what are the characteristics of the current Austrian meat regime? Second, who are the relevant actors, that influence meat politics in Austria, and what are their strategies and power resources? Third, how do these strategies materialize in Austrian policies around meat production and consumption? In order to answer these questions, we employ an analytical framework grounded in food regime theory (Brown, 2020; Friedmann and McMichael, 1989) and critical state theory (Brand et al., 2022; Buckel et al., 2014; Pichler and Ingalls, 2021). We use food regime theory to ground Austrian meat politics in historically and globally embedded patterns of food production, consumption, and regulation. For a nuanced analysis of the actors, their strategies and power resources to influence national meat politics, we employ categories from critical state theory. Methodologically, we conduct a qualitative content analysis of semi-structured interviews, parliamentary documents, press statements and policy documents to identify actors, strategies, and power resources in Austrian meat politics. The article is structured as follows: section 2 introduces the analytical framework for the analysis, section 3 outlines the meat regime in Austria. Section 4 then investigates contested meat politics in Austria and section 5 discusses the results in the context of a potential transformation in the meat regime.

2. Conceptualising and analysing meat politics

2.1. Food regime theory and critical state theory

To analyse contested national meat politics, we develop an analytical framework grounded in food regime theory and critical state theory. Using a food regime perspective provides an important lens for understanding how the development of national policies is embedded in global trajectories of geopolitical developments, agricultural intensification, commodification, and trade. Friedmann and McMichael (1989) carved out three global food regimes with varying patterns of food production, consumption, and mechanisms of socio-political regulation. While the periodisation of the three regimes has been criticised and re-conceptualized (see Tilzey, 2019) the production and consumption of meat has been an important product and driver in stabilizing capitalist relations. From the promotion of meat-intensive diets to increase worker

productivity for industrialisation in colonial states (Friedmann and McMichael, 1989; Dixon, 2009) to the establishment of increasingly large and intensive husbandry systems to create additional value from surplus grain production (Weis, 2021), meat played a central role in the first and second food regime (Friedmann, 1993; Langthaler, 2016). The third, “corporate” food regime is characterised by trade liberalization and an increasing flow of feed and meat being traded across large distances (Langthaler, 2016). Europe became a net exporter of animal products in the 1980s while remaining heavily reliant on the import of feed and other inputs (European Environment Agency, 2020; Plank et al., 2023; Roux et al., 2022). We use the term *meat regime* to reflect the dominant patterns of production, consumption, and regulation in Austria.

Food regime theory combines a world systems perspective with regulation theory and focuses mostly on global developments. It has been criticised for being too structurally deterministic, lacking explanation of agency and separating the local from the theoretical global regime (Potter and Tilzey, 2005). To counter this, recent research has therefore increasingly focused on re-localising the approach to examine how national actors influence global food regime trajectories (Jakobsen, 2021; Pritchard et al., 2016; Tilzey, 2019) and livestock systems (Ríos-Núñez and Coq-Huelva, 2015). These approaches highlight how power relations at the global and local level interact to further the interest of a social group. On the one hand, actors, structures, and processes on the national level play an important role in positioning, legitimising or challenging meat production and consumption. On the other hand, the interests of a social group are embedded in international and local relations (Potter and Tilzey, 2005). Tilzey (2018) has also suggested modifications to food regime theory that pays closer attention to inter- and intra-class struggles and positions the state as the central nexus where these take place.

To examine the contestation and power relations at the national level, we draw on critical state theory (Jessop, 1990; Poulantzas, 1978) which has been brought into dialogue with food regime theory (Plank et al., 2020; Tilzey, 2019, 2018). We employ historical materialist policy analysis (HMPA) (Brand et al., 2022; Buckel et al., 2014) which frames the state as a terrain where different societal actors struggle to gain influence by pursuing political strategies that serve their agenda and interest (Pichler and Ingalls, 2021). These societal actors aim to universalize their interests, norms, understandings, and ideas within the state and thus within policy (Brand, 2013). Public policies, or the lack thereof for some areas of conflict, are therefore the result of existing power relations characterised by diverse power resources that institutional actors can draw upon. Institutional actors form these strategies based on their understanding of a given problem (in this case, the level of meat production and consumption) which is closely linked to their interests, position within the value chain, and their resulting vision of the desired future.

When analysing these strategies, we differ between *accumulation strategies* (concerning the strategies for economic growth and profit with regard to meat production and consumption) and *state strategies* (referring to the policies, regulations, and institutions necessary to achieve these economic interests) (Buckel et al., 2014; Jessop, 1990; Pichler and Ingalls, 2021). To account for the contested process of formulating policies on meat production and consumption, we use the term *meat politics*. We use the analytical categories of accumulation and state strategies to show how different institutional actors pursue different interests and try to influence policies based on these interests. We abstract these strategies – and the respective institutional actors – into *political projects*. Political projects, therefore, group actors with relatively coherent visions and strategies to identify general directions in the meat regime. Fig. 1 outlines our framework for analysis.

The institutional actors (e.g., agricultural business associations, retail representatives, political parties, NGOs) – and therefore also the political projects in a more analytical perspective – can draw upon varying power resources to influence state policies and universalize

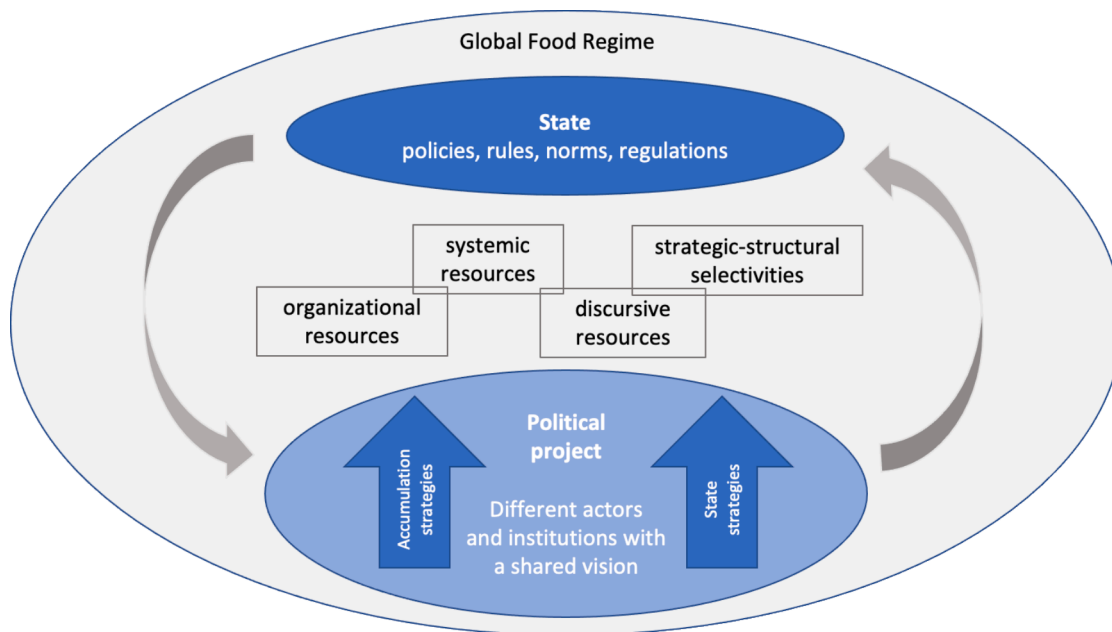


Fig. 1. Framework for the analysis of power relations in meat politics (own representation based on Pichler and Ingalls (2021) and Buckel et al. (2014)).

their interests. Our analysis draws on the systematisation of power resources by Buckel et al. (2014) and differentiates between organizational, discursive, systemic resources, and strategic-structural selectivities (see also Brand et al., 2022; Pichler, 2015; Pichler and Ingalls, 2021). *Organizational resources* refer to qualities or characteristics of the actors themselves. This includes financial, social, and personal resources (e.g., for marketing initiatives or campaigns) but also knowledge of the system and the right time to act. Actors can mobilize *discursive resources* when they align their interests with publicly accepted discourses, symbols, or ideology. The use of the Schnitzel as a symbol of freedom and civil rights is a prominent example of a discursive power resource. *Systemic resources* refer to actors' ability to make system-relevant decisions, especially providing or removing financial and human capital but also contributing to rural development and rural landscapes. *Strategic-structural selectivities* result from path dependencies in international or national production and consumption of meat. Actors can wield power from these path dependencies when their strategies and aims are closely aligned with already existing economic processes, institutions, and regulations. For example, an established voluntary regulation, such as the AMA (Agrarmarkt Austria) Quality Label, can provide an easy pathway for increasing state regulation and can thus benefit actors previously involved in the voluntary scheme.

The various power resources interact and overlap. If and how actors can influence policies, depends on the availability of resources but also

on how these are combined and utilised in a socio-economic context and on contingent events (e.g., natural disasters or higher prices due to geopolitical rivalry). While state policies are not only a result of the projects power relations, they are formulated and enacted in the context of competing social relations (Brand et al., 2022) and can serve as an illustration of how power is materialised in the state. While this methodology is suitable for understanding power and politics on a more strategic state and policy level, we are not able to equally address informal forms of regulation.

2.2. Methodological approach

To analyse meat politics in Austria, we use semi-structured interviews (Meuser and Nagel, 2009) with institutional actors that are involved in meat politics and qualitatively analysed these using the categories developed above. The interview partners were selected based on desk research on meat production and consumption in Austria and expanded using snowball sampling. The aim was to speak to a variety of actors from the areas of civil society and NGOs (5), meat production (4), meat industry and retail (2), government representatives (1) as well as research (1) as indicated in Table 1. Another important criterion for the selection was the strategic insight into the politics of meat production and consumption these organizations have. The interviews were conducted by the first author via videoconference or in person between

Table 1
List of interview partners and date of interview.

ID	Role	Institution	Perceived Gender	Date of interview
I1	Science	Key informant and expert in organic farming practices	M	28.02.2022
I2	Civil Society	Representative of a civil society initiative	M	08.02.2022
I3	Civil Society	Representative of an international farmers organization	M	11.02.2022
I4	Civil Society	Representative from national animal welfare and animal rights NGO	M	10.03.2022
I5	Civil Society	Representative of international environmental NGO	F	21.03.2022
I6	Civil Society	Representative of a national labour and consumer protection union	F	24.02.2022
I7	Gov't Entity	Head of a national consultative group for nutrition	F	09.03.2022
I8	Production	Representatives of national agricultural marketing agency	M & F	18.03.2022
I9	Production	Representative of Austrian Chamber of Agriculture	M	29.03.2022
I10	Production	Representative of national pork industry	M	01.04.2022
I11	Production	Representative of national poultry industry	M	01.04.2022
I12	Industry	Representative of the Chamber of Commerce / Food Industry Association	M	28.03.2022
I13	Commerce	Speaker of a food retailer	F	22.04.2022

February and April 2022. The interviews served to investigate the actors' visions of meat production and consumption, strategies to achieve this vision, and their involvement in the policy processes. Depending on the interview partner, the questions were slightly adapted to include more detail on specific events, conflicts, and policy processes. The interviews were conducted and transcribed in German, with single quotes translated into English for the purpose of this article. Interview partners were granted anonymity but the mentioning of institution and/or function to be used in the analysis was agreed upon with them. The interviews were triangulated with additional documents such as media interviews, press statements, and parliamentary records to substantiate information and gain further insight into actors' strategies and power resources.

The qualitative content analysis of the interviews and additional documents was supported by Atlas.ti. We developed categories based on the analytical framework (e.g., accumulation and state strategies, power resources). We then deductively coded the material along these categories and inductively refined the categories based on the content. A peer review of the coding was conducted with short passages at the beginning of the analysis. The analysis and abstraction of overlapping strategies allowed for the identification of three political projects. The main criteria for this abstraction were the general vision of future meat production and consumption as well as the strategies to achieve the respective vision. The abstracted results and political projects were discussed among the co-authors as well as a further researcher familiar with Austrian meat production and consumption. As the political projects are analytical abstractions, the actors may not publicly align with each other or necessarily see each other in alliance (Buckel et al., 2014).

3. The meat regime in Austria

In Austria, the development of agricultural production since 1945 has been characterised by increasing specialization, concentration, and export orientation. Aided by the Marshall Plan and oriented towards increasing food security, policies in the 1960s and 1970s focused on increasing agricultural production. This included a restructuring of agriculture towards specialised crop and livestock production but also more intensive livestock production and meat-intensive diets (Friedmann, 1993; Langthaler, 2016). Given the benefit of using 'disadvantaged' mountainous regions for ruminant animal production, many farmers in Alpine regions specialised in beef and dairy production. However, specialised livestock production also intensified in the pre-Alpine areas and plains. Today, three provinces (Lower Austria, Upper Austria, and Styria) dominate meat production, making up two-thirds of the produced value (Krausmann et al., 2003; Statistik Austria, 2021).

Characterised by a high proportion of farms with difficult production circumstances in Alpine regions, agricultural policies have been oriented towards protecting production in these areas with high levels of subsidies (Sinabell, 2020, 2004). This also became a central point of discussion in the Common Agricultural Policy (CAP) when Austria joined the EU in 1995. The result was that area-based direct payments (first pillar of the CAP) were complemented with a high level of financial support for measures to ensure competitiveness of smaller sized farms in marginal Alpine areas, support rural development and encourage ecological practices (second pillar of the CAP). Still today, Austria distributes more subsidies through the second pillar, including payments for ecological measures, extensification and rural development projects, than through direct income support (BMLRT, 2021a).

Despite these policies, the structure of agricultural production in Austria has followed similar patterns as in the rest of the EU with a decreasing number of farms and larger production volumes (BMLRT, 2022). The number of farms has decreased from over 700,000 livestock farms in 1960 to 126,000 in 2020 (BMLRT, 2021a) with an increasing density of animals. The average number of animals per farm has increased by over 60 % for cattle and 40 % for pork farms while more than doubling for poultry since 1999 (Statistik Austria, 2020). Through

the process of specialization and intensification the total gross production of all meat types has increased since 1960. With over 900 %, poultry accounted for the largest increase, followed by pork (89 %) and beef (43 %) (own calculations based on BMLRT, 2021c). Increased concentration can also be seen further along the value chain. The number of slaughtering and processing firms has decreased over the years and the majority of meat is now processed in a few systemically relevant firms (Pröll et al., 2022). Additionally, the Austrian food retail sector has one of the highest degrees of concentration in Europe, with the largest four firms making up over 90 % of the market share (Statista.de, 2022).

With regard to trade, Austria is a net exporter of meat products, especially beef and pork (BMLRT, 2021b). Overproduction is highest for beef (145 % self-sufficiency), while the poultry sector is still dependent on imports (77 %) (BMLRT, 2022). The largest proportion of meat exports remains within the EU (especially Germany), while large amounts also leave the EU, mostly to China, followed by South Korea and Japan (BMLRT, 2021b). In 2020, of the 215 thousand tonnes of pork meat exported, around 59 thousand tonnes went to Germany and 29 thousand tonnes to China (BMLRT, 2021b). For the last 10 years, the revenues from exports are identified to be driving investments in the agri-food sector (Fi-compass, 2020) and the Ministry of Agriculture frames them as "urgently necessary" (BMLRT, 2021a, p. 144).

The marketing and quality assurance of national production is maintained by the national marketing board, the AMA Marketing. To strengthen sales of national products, it conducts marketing campaigns and has implemented the AMA Quality Label, an important certification scheme for Austrian quality. The certification standards for the label are accorded among representatives of the sector, industry, and interest groups. For animal products, the standards proclaim that the animal has to be born, fed, slaughtered, and processed in Austria (AMAMarketing, 2020). In its annual report to the parliament, the AMA Marketing claims that approximately 60 to 70 % of fresh meat sold in food retail has an AMA Quality Label (AMAMarketing, 2020). The AMA Marketing is mainly financed through marketing contributions from producers, currently dominated by meat and dairy producers. In 2020, the meat sector contributed over 30 % of the marketing budget and animal products in total amounted to nearly 90 % (own calculations based on AMAMarketing, 2020).

The per capita meat consumption in Austria fell slightly to 58.9kg in 2021 (Statistik Austria, 2022) accompanied by an increase in the number of vegetarians, yet this remains under 10 % (Mayr, 2020). While decreasing in significance, over half of the meat consumed is pork, making up 58 % of per capita consumption. This is followed by poultry (21 %) which has been gaining popularity. Beef and veal consumption make up 18 % (AMAinfo, 2021). The majority (90 %) of food purchases (including meat) in Austria takes place in food retail with specialized retailers and direct marketing in a marginal position (AMAMarketing, n. d.).

4. Contested meat politics in Austria – Between protecting national production, extensification and retail integration

The following section introduces three political projects – the dominant, the alternative and the incorporating – to discuss central actors, their vision, strategies, and power resources. It provides insights into where these projects diverge and where they align to influence meat production and consumption in Austria. To do so, we also outline important policy outcomes and how these relate to the projects and power resources discussed. Table 2 gives an overview of these results.

4.1. The dominant political project of market differentiation and national production

The dominant political project represents the national meat regime that has emerged with agricultural intensification since World War II. It is driven by actors involved in or closely related to producing meat and

Table 2
Summary of political projects' strategies and power resources (own abstraction and elaboration based on interviews and documents).

Political project	Market differentiation and national production (dominant)	Agricultural extensification and structural reform (alternative)	Retail integration and consumerism (incorporating)
Vision of meat consumption	Availability of Austrian meat, always for everyone to choose	De-intensification of production and lower consumption	Availability of meat and meat substitutes, always for everyone to choose
Central actors	Production, agricultural representation, food industry	Animal welfare and environmental NGOs, civil society movements	Retail, gastronomy
Accumulation strategies	Increase consumption of better, Austrian meat Market differentiation to profit from niches Orientation towards export markets for overproduction	Less and better meat De-intensification of production Changed consumer-producer relations	Promotion of consumer choice Vertical integration of production by retailers
State strategies	Support and subsidies for market differentiation Consumer education and information Origin labelling, preferably through the AMA Quality Label	Active state regulation of production (through reducing quantity) and consumption (through restricting marketing for meat and dairy products)	Private and industry initiatives (vertical integration, retail brands) Consumer education and choice
Institutional-strategic selectivities	AMA Quality Label offers path for policy development Historical dominance and representation in agricultural policies	Momentum from policy changes in Germany	Market-oriented, neoliberal paradigm favours voluntary regulation
Systemic resources	Number of farmers Contribution to rural economy		Economic concentration (retail oligopoly) Increasing vertical integration Network Austrian Retail Association / Chamber of Commerce with ministry Integrated into ministerial and AMA bodies
Organizational resources	AMA Marketing as a resource pool Close personal and organizational ties to agricultural ministry and upstream state organisations Media relations and capacities	Well-connected Competing for financial resources Connections to retail, production and (increasingly) ministries (through Green Party in government) Media relations and capacities Citizen and voter mobilization efforts	
Discursive resources	'Austria has higher standards' 'We set the table'	'There is an alternative' Unveiling shocking images	'Right to meat' 'Regulation is paternalistic' Aligns with discourse of other projects Fairness office as a consultative body (2022) Prevention of regulation in sales
Manifestation in policies	CAP strategic plan 2023–2027 Sustainable procurement guideline (naBe) Regulatory drafts of origin labelling	Animal welfare packet 2022	

dairy. A close alliance between the Chamber of Agriculture, the farmer organisation of the conservative Austrian People's Party, ÖVP (Bauernbund), and the Raiffeisen group has for a long time formed the political farmer representation (Salzer, 2015). Through their dominance within state institutions, they have significantly shaped agricultural policies. Apart from a short period of 16 years from 1970 to 1986, the ÖVP has overseen the agricultural ministry and there is an overrepresentation of farmers and Bauernbund officials in the national parliament. As of July 2022, 10 of the 71 ÖVP representatives in parliament had listed current or past activities in the Bauernbund (Österreich Parlament, n.d.) and 34 % of the representatives in parliament were listed as farmers, compared to only 3 % in the population (Janik, 2020). Husbandry farms comprise 40 % of all farms (Statistik Austria, 2016) making them systemically important. A representative of the pork industry highlighted that "politicians on the state and federal level listen to us [...] there is a high affinity towards us, and this is based on reciprocity, that the pork farmers, and generally all husbandry farmers, are kept happy so to say" (I10).

Even before joining the EU, Austria had a high level of agricultural support such as price floors to increase production and export subsidies (Hoppichler, 2007). In the late 1980s, then agricultural minister Josef Riegler from the ÖVP coined the concept of *eco-social agricultural policy* in line with their political program of an eco-social market economy (Grünwald, 2013). It became the leading vision for Austrian agricultural policies aiming to create "ecologically and economically appropriate peasant-type agricultural production methods" (Riegler, 1988 translated by Schermer, 2015, p. 126). This vision builds on the belief that based on human self-interest; the market is the most effective mode of regulating agricultural production. The role of the state is therefore not to actively engage in environmental and social protection but rather to offer a regulatory framework for the market to fill these demands (Grünwald, 2013). At the same time, the concept promises to protect

peasant-type and family-run farms. This formulation served to legitimize increased public spending in agriculture (Hoppichler, 2007) while masking that larger farm holdings and public institutions receive the majority of payments (FarmSubsidy.org, 2023; Prager and Koch, 2022). While the high subsidies could slow down some processes of intensification and structural change, deregulation and EU membership required many farms to consolidate and specialize (Krammer and Rohrmoser, 2012; Krausmann et al., 2003).

Balancing between the need to specialize and intensify production to remain competitive and supporting small-scale livestock production in Alpine regions, the dominant project continues a productivist vision of agriculture. In doing so, it accommodates niches but only as long as these do not threaten the dominant form of production. Meat is framed as vital to productively use mountainous grasslands and is seen as an essential part of the human diet and national identity (I9, I10, I11). While dominant actors accept that meat consumption is too high, sustainability and health concerns are warded off and blame is shifted onto imports. The central accumulation strategy consists of market differentiation accompanied by the promotion of national production and an export-oriented trade regime. The aim is to protect national production by creating additional value and demand through new segments and niches, counteracting the trends of increasing consumer scepticism, and decreasing meat consumption (I9).

To protect national meat production and further market differentiation, the dominant project relies on a market-oriented state strategy, where change is driven by consumer choice. As one representative from the Chamber of Agriculture formulated: "in the end, it always comes down to the fact that the consumer decides with his wallet" (I9). Information campaigns, education, market transparency, and labelling are seen as important instruments to increase the consumption of meat products from national origin. By re-introducing traditional forms of meat preparation or offering different quality of meat, actors aim to

reduce price pressure from neighbouring EU countries with larger-scale production systems. Dominant actors, therefore, support origin labelling and stricter public procurement guidelines which both serve to generate higher demand for national products. While EU regulations on the common market limit preferential treatment of products of a single origin, the national action plan for sustainable procurement (naBe) passed in 2021 defines criteria that correspond to Austrian production standards – essentially favouring Austrian products (BMK, 2021; I12). The coalition programme of the ÖVP and Green party government (2020–2024) also formulates several measures to improve voluntary and mandatory origin labelling of animal products with regulatory drafts in discussion at the time of analysis.

The project utilizes the AMA Marketing and its voluntary quality label as a central strategic-structural and organisational resource. The label serves to convey Austrian heritage while the standards of the label are set among industry members. Sceptical of setting higher mandatory production standards, dominant actors prefer to increase the voluntary standards of the AMA Quality Label and push for mandatory origin labelling to increase the label's significance. Such a strategy enables the non-certified farmers to continue production at lower standards while leaving the uptake of higher social and environmental standards guaranteed through the label to the market (i.e., consumer choice). Pre-emptive voluntary standards also help to pacify public pressure and bolster demand for national products (see also: Lacy-Nichols and Williams, 2021). Standards of the AMA Quality Label function as an industry-accorded certification which serve to create strategic structural selectivities in state programs. As a representative from the Chamber of Agriculture pointed out, “it is no coincidence that”, the criteria defined in the state agriculture and environment program, “correspond to those that are rewarded through the AMA Quality Label” (I9). The AMA Marketing is also an organizational power resource as it bundles marketing resources and competencies, especially from meat and dairy producers that currently dominate its budget.

The dominant political project can also draw on discursive resources to support its strategy of increasing national production and consumption of meat. Stories and images of rural livelihoods, farmers, and animals appeal to romanticised ideals of rural life and national identity. Along with highlighting high standards and better controls in Austria (I11), this serves to legitimize higher prices for national products, while associating imports with intransparency and lower standards. These discursive resources of rural livelihoods and identities are also used to promote exports. The former EU Commissioner Franz Fischler branded Austrian production on the international stage by framing Austria as the “delicacy store” of Europe (Scherner, 2015). This image still underlines the importance of food exports for national accumulation and profits (BML, 2021). While differentiated and geographically specific product exports (such as *Tiroler Speck*, Tyrolean bacon) serve to legitimize the support of meat production, export markets also play an important role in maintaining over-production. Unseasonal cuts, production without the AMA Quality Label or excess production is frequently exported to regions where demand is growing, and ecological concerns are not yet a priority (I9, I12). These export markets are identified as particularly important when retail concentration or overproduction on the national market limit returns for producers (I12). While the economic importance and employment in agriculture are decreasing with increasing dependence on up- and downstream processes (Sinabell and Streicher, 2020), dominant actors reassert their systemic relevance by defending the importance of animal production for added value in rural areas, rural identities, and “setting the table” (I10) appealing to concerns of food security.

The dominant project of market differentiation and national production remains the driving force behind Austrian meat policies, as can be seen, in the most recent CAP strategic plan (BMLRT, 2021d). For the next years, the strategic plan aims to continue and expand climate-friendly and area-adapted husbandry, while concurrently pointing to decreasing consumer demand for animal products as a main barrier. The

project is successful in combining the interest of national meat production with social and ecological concerns while orienting investment subsidies towards increasing production capacities in livestock systems (Burtscher-Schaden et al., 2020). Increased production of non-meat proteins (soy or other legumes) is only promoted in the context of decreasing reliance on imported animal feed but not as a substitute for meat consumption (BMLRT, 2021a). Policies that challenge the dominance of meat production and consumption remain sparse (Hundscheid et al., 2024) as powerful dominant actors manage to distract from reducing consumption with diversified and Austrian “good” consumption while stabilising production.

4.2. The alternative political project driving agricultural extensification and structural reform

The dominant political project is increasingly challenged and resisted by a civil society-driven alternative project. Actors in this project aim to disrupt the current form of accumulation that relies on and supports intensive livestock production and high meat consumption. The alternative project instead calls for an extensification of agricultural production, decreased meat consumption, and a change in producer–consumer relations. While actors in the alternative project align with the dominant project regarding regional production and value chains, they simultaneously highlight the importance of extensive production, the reduction of global dependencies along the value chain, increased on-farm diversity, as well as participation in the value chain and policy making. The spatial and discursive distance between production and consumption globally and nationally is a central point of criticism. As one representative from an international farmers organization describes; farmers “want to be able to produce good food for the people in [their] surroundings” (I3).

Actors within this project include NGOs (addressing animal welfare & rights, environment, and small-scale farmers), civil society initiatives, researchers, and consumer protection organizations. They combine different positions on meat production and consumption and are united in the strategy to transform the current accumulation regime through more active political regulation. Environmental and animal welfare NGOs call to regulate meat production and consumption to reduce external costs (carried by the environment and the animals), which may include vegetarian or vegan diets. On the other hand, small-scale farmers have an interest in furthering their extensive production methods which frequently rely on animal production (e.g., mountain or organic/Demeter farmers).

Rather than relying on individual consumer responsibility and market dynamics, actors in this project argue that “the state has to steer, not the single consumer” (I6). State regulation should aim to reduce the dominance of cheap meat and address structural inequalities, rather than placing overriding responsibility on the consumer to choose the ‘right’ products (I2, I5, I7). Preventing overproduction is seen as essential to reduce the dominance of cheap meat. Various actors from environmental, animal welfare and small-scale farmer NGOs actively propose policies that limit production levels. These include higher mandatory animal welfare standards and changes in subsidy schemes. Additionally, health and consumer protection-oriented organizations call to reduce consumption pressure by restricting marketing activities for meat products. Furthermore, these organizations aim to challenge the political dominance of conservative actors by demanding active participation in institutional processes and policymaking for citizens and non-agricultural producers. For example, a representative of an animal rights NGO stated that the demands of those not active in agricultural production themselves are often side-lined and de-legitimised in agricultural policy discourses (I4).

The alternative project utilizes discursive power resources to point to the inconsistency and hypocrisy of the romanticised narrative around national meat production. By providing insights into meat production in Austria (e.g., by publishing shocking images from a pork farm), the

dominant narrative of “good Austrian” versus “bad foreign” meat production starts to crack. At the same time, the actors of the alternative project are involved in presenting alternatives either by living and practising alternative production and consumption (Plank et al., 2020) or by making concrete policy proposals for changing extractive production. For example, a representative of an animal welfare and rights NGO highlighted their work in showing what a pig would need to live out its natural behaviour in contrast to what is economically efficient. These images appeal to public morals and provide an alternative perspective opposed to production solely based on efficiency and human gains. The project is becoming increasingly powerful by creating spaces “where new possibilities are made visible” (I3) and shifting the narratives around food and animal production (I3, I4).

The alternative project also benefits from organisational resources, although to a limited extent. Communication and media expertise in NGOs as well as close networks among the actors enable them to successfully position themselves in the public sphere. Actors frequently work together to influence individual policy initiatives, for example, to organize joint criticism of the national CAP strategic plan, where environmental NGOs joined trade unions in their statements (Burtscher-Schaden et al., 2020). Yet, with few financial resources, the organizations also find themselves in competition with each other for finances and attention (I4), weakening the project as a whole. Structural disadvantages also weaken the project as some actors, such as small-scale and extensively producing farmers, have limited resources for participation given their more time-intensive production methods (I3).

Despite these disadvantages, our research shows that the alternative political project has gained power and momentum through increased organizational resources and structural selectivities, largely driven by the participation of the Green Party in government (I4, I5). Being historically close to NGOs and social movements has – to some extent – enabled the positioning of alternative strategies within state bodies. Adding the perspectives of environmental NGOs and vegan representatives to the consultative body for nutrition is one example (I5). Interviewees also pointed to the growing importance of initiatives from sub-national (e.g. municipal) actors in initiating change. These have created platforms for discussing and rearranging producer–consumer relations on a local level where strategies of the alternative project are included from the beginning (I3). In this regard, alternative strategies are also supported through close economic and political ties to Germany acting as a structural resource. As the largest trading partner, legislative changes in Germany also influence policymaking in Austria. “Germany now, [...] has a Green agricultural minister, this creates a lot of opportunities” (I3). With this statement, the representative of an international farmers organization formulates the hope that progressive animal welfare legislative proposal in Germany will, on the one hand, reduce price pressure on Austrian production. On the other hand, policies and political processes in Germany may provide a blue-print with lessons-learned for Austrian policy makers. For example, following commitments by retailers and the agricultural ministry in Germany to implement an animal welfare label, the discussion was also reignited in Austria (Die Presse, 2022).

An important legislative change was brought about through the formation and success of the animal welfare referendum. Formed and initiated in 2018, the referendum utilised voter mobilization as an organizational resource to enter dialogue with multiple political parties (I2). In the final phase, it collected over 400,000 signatures and played an important role in the initial ban of fully perforated flooring in new pork stables in 2022 (Parlament.gv.at, 2022). The referendum served to further the strategy and individual political initiatives of the alternative project by building a bridge to the dominant project. The initial demands were formulated together with various NGOs, this cooperation was not pursued further as the organizers aimed to break out of the radical and idealistic image that animal welfare and environmental NGOs are frequently associated with (I2). The referendum used its independence from NGOs as a resource to position animal welfare

concerns with a wider range of voters. It also profited from aligning with dominant actors and organizations for financing (e.g., Gourmet Fein, a conventional meat processor, was a large sponsor) and knowledge of timing to position their demands in the government program after re-election in 2019. The referendum played an important role in creating pressure for changes in meat production systems through the law to fully ban perforated floors. While the formulation of the law demonstrated the increasing power of the alternative project, it also provides an example of the contestation within the state. The initial law, passed in 2022, could only be passed with incremental changes to production systems, leading to a long transition phase until 2040. In 2024, however, the constitutional court ruled that the prioritisation of the law to protect investment over animal welfare was objectively unjustified. Policy makers are urged to formulate a new law until June 2025 (Vfgh.gv.at, 2024).

4.3. The incorporating political project fostering retail integration and consumer-choice

The visions and strategies of both the dominant and alternative political projects are increasingly being incorporated into an economically powerful third, retail-driven project. Incorporating the visions of consumer choice and market differentiation, this retail-driven project follows an accumulation strategy of flexible production and consumption. An increase in product variability and flexibility allows the incorporating project to quickly react to changing consumer preferences and generate higher returns. The vision combines an increase in meat from organic production (guaranteed through voluntary certification standards) and meat substitutes while also perpetuating the sales of cheap meat.

The project is centrally driven by representatives of the Austrian Retail Association (Handelsverband) and the four large food retail chains that dominate the Austrian market with over 90 % of the market share (Statista.de, 2022). Food retail accounts for 80 % of meat purchases (AMA Marketing, n.d.), and meat products (especially fresh cuts) essentially drive sales volumes (Handelsverband & Oliver Wyman, 2014). Due to the high density of retail outlets, competition between these outlets is high and price actions on meat are frequently used for bait. For example, 44 % of pork sales in food retail are sold in the context of a special price offer (Mayr, 2020). Another actor that aligns with this project is gastronomy, which also benefits from maintaining a mostly unregulated market given that most meats sold in gastronomy are claimed to be imported (Oekoreich, 2022).

While food retailers and gastronomy recognize the growing importance of regional meat with higher animal welfare and ecological standards (Handelsverband, 2023; Netzwerk Kulinarik, 2023), they defend markets and consumers in shaping these trends. For example, a representative from a large food retail chain states that “this [conventional] agriculture is increasingly coming under pressure and that they should actually be brought to produce differently, more in line with the market” (I13). The claim that “food retail is in many ways simply a mirror of society, we have the assortment that the consumers buy” (I13), discursively underlines their position to protect consumers from paternalistic regulation. To pursue its accumulation strategy, the project relies on informed consumers that shape food markets. In such a vision, limiting price promotions in retail would restrict the “autonomous consumer decision”, as a retail representative argued (Handelsverband, 2019).

Economically, the retail-driven project follows a strategy of vertical integration, where retailers use their systemic power resources to increasingly incorporate upstream processes. For example, the retail chain SPAR owns one of the largest meat processing firms in Austria, the Tann Fleischerwerke. The strategy of vertical integration stems from the understanding that current agricultural production “is a little sluggish” (I13) in transitioning to more ‘market oriented’ production. Thus, retailers are “trying to go [their] own way with suppliers” (I13), forming separate contracts or creating their own initiatives with producers to

meet changing consumer demands. Similarly, retail chains have been quick to integrate alternative protein products (in fall 2022, Billa, the largest retail chain belonging to REWE International INC, opened a store selling only plant-based products) and have created a vast array of retail brands (I13; [Lischtschuk and Lenders, 2019](#)). Considering these systemic power resources, retailers and gastronomy are largely opposed to regulation that reduces their ability to meet and adapt to market demands. They, therefore, align with the dominant project in strengthening existing voluntary certification schemes such as the AMA Quality Label (or the Netzwerk Kulinarik for gastronomy) but prevent mandatory state regulation.

The retail-driven project can incorporate and benefit from the discursive resources of the dominant and alternative projects. Placing organic and regional production upfront, food retailers profit from narratives of rural livelihoods and national identity, while at the same time relying on economic efficiency to secure profits ([Schermer, 2015](#)). Retailers justify price offers as a necessary means to deal with periodic overproduction (I13) and to secure higher sales of national products compared to imports ([Handelsverband, 2019](#)), consequently claiming to protect national producers. While agricultural producers and civil society initiatives criticize this practice, and the dominance of food retail in general, so far, no strategies have been formulated to counteract it.¹ This relative success mainly stems from the systemic power resources of the retail sector, i.e. economic concentration, and vertical integration, but also from the successful incorporation of consumer choice and national production while masking the perpetuation of cheap meat.

5. Discussion

A decrease in meat production and consumption in high-income countries is a central lever to reduce climate and environmental impacts and achieve global sustainability goals. Yet, political measures to address the overconsumption of meat remain sparse ([Bergthaler, 2021](#); [Hundscheid et al., 2024](#); [Wellesley et al., 2015](#)) and mainly in the realm of consumer responsibility ([APCC, 2018](#); [Penker et al., 2022](#); [WBAE, 2020](#)). Additionally, measures addressing high production levels are necessary to prevent spill-over of environmental costs ([Roux et al., 2022](#)). We expand the body of existing literature on the political economy of food systems transitions and the politics of meat production and consumption with a country-specific insight into the political challenges associated with such a change. Our analysis provides insight beyond Austria by adding nuance to frequently identified struggles between producers, food industry, and civil society identified in other literature ([Lacy-Nichols and Williams, 2021](#); [Sievert et al., 2021](#); [Swinburn, 2019](#)), focusing on their strategies and power resources to influence the state.

We identified three political projects that are competing for influence in meat politics. While there is a growing awareness in Austria that meat consumption has to be reduced, this has not yet resulted in concrete political measures ([Bergthaler, 2021](#)). Rather, the systemic, organisational, and discursive power of the dominant, production-driven project risks overshadowing the need to reduce consumption by promoting 'better' Austrian meat (see also [Dixon and Blanwell, 2012](#); [Trewern et al., 2022](#)). This production-driven project employs the national marketing board and associated quality label as an organizational resource to steer consumption and create new market segments through voluntary certification while also benefitting from its structural power in formulating policy pathways. Historically influential in the formulation of agricultural policies, its vision is framed around the protection of smallholder farmers and rural livelihoods while enabling and profiting

from ever-larger and intensive production patterns and increasing exports ([Salzer, 2015](#)).

The dominant project is challenged by a civil society-driven alternative project that pushes for an extensification of production and consumption patterns. By pointing to the inconsistencies and hypocrisy of the dominant narrative and presenting alternative forms of production and consumption, this vision can – to some extent – erode public support for the dominant regime. The civil society-driven project profits from increasing representation in state bodies (e.g., through the participation of the Green Party in government). In recent years, however, both projects are increasingly threatened by an economically powerful, retail-driven project which incorporates aspects from both visions. Discursively, the retail-driven project benefits from aligning itself with both more regional and more ecological and extensive production, while it draws on systemic power resources to integrate upstream production (e.g., through the acquisition of meat processing companies or forms of contract farming) to reduce costs, increase flexibility and market power. This is increasingly also true for the promotion of meat substitutes. Food retailers profit from their systemic market power to react to changing demands and position themselves as consumer custodians that can offer both affordable meat *and* meat substitutes. This gives the retail-driven project growing control over meat production, while also supporting alternative consumer choice. The market-oriented strategy of the dominant project, which relies on consumers making the 'right' choice for national products, reinforces this powerful position.

The dynamics identified in Austria are similar to those identified by [Potter and Tilzey \(2005\)](#) which trace EU agricultural policy making in the light of a growing neoliberal agenda through the Uruguay Round in the World Trade Organization. They carve out that the neoliberal discourse, aiming to revert strong state influence on agricultural markets, is met with a strong neo-mercantilist discourse in Europe, which seeks to protect small-scale producers from global market pressures, and a growing call to incorporate multifunctional aspects (environmental protection, rural development, and social welfare) into public policies. Yet, they point to the growing influence of "non-productive capital" ([Potter and Tilzey, 2005, p. 585](#)) within the agro-food industry (from processing to retail) that pushes for liberalization to the detriment of producers that find themselves exposed to increasing market pressures. This increasing polarization between productive and non-productive capital and among agricultural classes has also "eroded the coherence of the agricultural policy community" ([Potter and Tilzey, 2005, p. 589](#)) and contributed to the subsequent success of neoliberal reforms in agricultural policy. [Krammer and Rohmoser \(2012\)](#) identified a similar pattern and argue that small farmers in Austria have been co-opted for the interests of large agricultural holdings which frequently also represent agricultural interests in state institutions ([Salzer, 2015](#)).

The incorporation of alternatives (from meat substitutes to organic and animal welfare oriented production) and the growing power of the corporate sector is in line with other authors studying the political economy of food systems ([Baker et al., 2021](#); [Sievert et al., 2020](#)). [Schermer \(2015\)](#) also identified this pattern of incorporation in his study of changing producer–consumer relations in Austria with the shift from the second, productivist food regime to the third, corporate food regime. Schermer argues that supermarkets in Austria have been successful in positioning *food from here* (associated with quality and origin) while selling much more *food from nowhere* ([Schermer, 2015](#)). The successful coordination between demands for green, organic, and local production within a globalised market and the dynamic of civil society critique and corporate appropriation is central to the corporate environmental food regime ([Campbell, 2009](#); [Friedmann, 2005](#)). Food retailers show flexibility and willingness to incorporate meat substitutes and *food from somewhere* but avoid discussions about reducing meat production and consumption ([Fuchs et al., 2016](#)). Additionally, they also reinforce corporate control over food systems, especially through the direct integration of upstream production. The corresponding price pressure

¹ In 2022 a Fairness office was implemented, in line with EU regulation (EU) 2019/633 on unfair trading practices for businesses in agriculture and food. Yet, this is designed to be a consultative body aiming to act as a moderator in conflict rather than change negotiation circumstances and power hierarchies that disadvantage producers.

exerted by food retailers makes agricultural producers even more opposed to mandatory production standards that are feared to further increase this price pressure.

Looking at changing patterns of meat production and consumption, not only as a change in consumer preferences but as a field of contested politics, provides insight into power relations in the meat regime, and how these may be transformed. The analysis shows that when it comes to lower meat production and consumption, national governments remain an important terrain of contestation that are well positioned to regulate dietary change and stand to gain through reduced healthcare costs and reduced emissions (Wellesley et al., 2015). Yet, historically composed of actors from the dominant project with little interest in reducing production and guided by a market-oriented logic of corporate actors, regulatory action in the Austrian state is lethargic.

Local spaces of power reconfiguration are increasingly appearing where civil society-driven initiatives address unequal power relations to create more direct relations between producers and consumers, and participatory governance models (Mattioni et al., 2022; Rossi et al., 2019). The Vienna City Food Strategy, for example, brings together civil society actors and the municipal government to increase organic production and reduce animal products in public procurement while also working towards a holistic food policy that considers health, alternative food networks and spatial planning (Ernährungsrat Wien, 2022). Plank et al. (2020) also trace the growth of the CSA sector in Austria which increasingly provides the opportunity for consumers to align with small-scale producers outside of market dynamics. In which ways these initiatives challenge current power configurations or remain a niche, warrants further investigation.

6. Conclusion

Transformations towards sustainable food systems include the reduction of meat production and consumption. This requires actions by a multitude of actors as they include changing social and material structures. Relying on consumer decisions will not be sufficient for the necessary change in production and consumption patterns. This article has therefore focused on politics and power relations that shape these structures to better understand the political trajectories and resistance to change. We find that the current structures in Austria are driven by powerful actors in production which aim to establish a regime of national consumption rather than addressing excessive meat production and consumption patterns. On the other hand, movements in civil society are increasingly gaining ground by centring ecological and animal welfare concerns and challenging conventional production and high consumption levels. Yet, both national production and calls for alternative producer–consumer relations are subject to an increasingly powerful corporate retail sector, which integrates economic rationalization with ecologically oriented consumer demands to increase profits.

In our analysis we aimed to show that meat politics, the contested process of formulating policies on meat production and consumption, is the result of globally embedded food regimes that evolve with historically and geographically embedded power relations. To do so, we have employed historical materialist policy analysis to decipher how different actors employ a variety of power resources to universalize their interests within the state. Moreover, by embedding our analysis in food regime theory, we contribute to re-localizing the theory and provide a methodology that centres the state as the site where food regimes are both contested and stabilized. This provides a foundation for further empirical work on national and supra-national levels. Patterns in the production and consumption of meat in Austria demonstrate the manifestations of a powerful corporate regime where alternatives only develop at the margins. Most importantly, the article shows that the corporate food regime is successful to increasingly incorporate meat substitutes, it firmly resists proposals to actively regulate and reduce meat production and consumption. Here, municipal initiatives (e.g., public procurement) offer cautious attempts for active regulation.

CRedit authorship contribution statement

Charlotte Voigt: Writing – review & editing, Writing – original draft, Methodology, Investigation, Formal analysis, Conceptualization. **Laura Hundscheid:** Writing – review & editing. **Christina Plank:** Writing – review & editing. **Melanie Pichler:** Writing – review & editing, Supervision, Methodology, Conceptualization.

Data availability

Data will be made available on request.

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