

The Business Benchmark on Farm Animal Welfare Report 2018

Nicky Amos & Dr Rory Sullivan



BBFAW
Business Benchmark
on Farm Animal Welfare



The Business Benchmark on Farm Animal Welfare

The Business Benchmark on Farm Animal Welfare (BBFAW) is the leading global measure of farm animal welfare management, policy commitment, performance and disclosure in food companies. It enables investors, companies, NGOs and other stakeholders to understand corporate practice and performance on farm animal welfare, and it drives – directly and through the efforts of others – corporate improvements in the welfare of animals reared for food.

BBFAW maintains the Global Investor Statement on Farm Animal Welfare and convenes the Global Investor Collaboration on Farm Animal Welfare, a collaborative engagement between major institutional investors and food companies on the issue of farm animal welfare. In addition, BBFAW manages extensive engagement programmes with companies and with investors and provides practical guidance and tools for companies and for investors on key animal welfare issues.

The programme is supported by the BBFAW's founding partners, Compassion in World Farming and World Animal Protection, who provide technical expertise, guidance, funding and practical resources.

More information on the programme can be found at www.bbfa.com



Compassion in World Farming

Compassion in World Farming is the leading farm animal welfare charity advancing the wellbeing of farm animals through advocacy, political lobbying and positive corporate engagement. The Food Business programme works in partnership with major food companies to raise baseline standards for animal welfare throughout their global supply chains. The team offers strategic advice and expert technical support for the development, implementation and communication of higher welfare policies and practices, and increasingly frameworks for a more humane sustainable food system.

Compassion engages directly with many of the companies benchmarked in the BBFAW to highlight and support with policy development, welfare improvement and transparent reporting. The Food Business team uses the Benchmark alongside Compassion's other tools such as the Supermarket Survey, its awards programme, and its advisory services, to help companies understand how they are performing relative to their peers, to identify areas and mechanisms for continuous improvement, and to highlight sources of competitive advantage.

More information on Compassion in World Farming can be found at: www.ciwf.org.

More information on the work of the Food Business team at Compassion in World Farming can be found at: www.compassioninfoodbusiness.com



World Animal Protection

World Animal Protection has moved the world to protect animals for the last 50 years by working to give animals a better life. Its activities include working with companies to ensure high standards of welfare for the animals in their care, working with governments and other stakeholders to prevent wild animals being cruelly traded, trapped or killed, and saving the lives of animals and the livelihoods of the people who depend on them in disaster situations. World Animal Protection influences decision makers to put animals on the global agenda, and it inspires people to protect animals and to change animals' lives for the better.

More information on World Animal Protection can be found at: www.worldanimalprotection.ca

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Photography credits

Foreword

Since it was established in 2012, the Business Benchmark on Farm Animal Welfare (BBFAW) has dramatically changed the way in which investors think about farm animal welfare. Farm animal welfare has moved from being seen as a niche ethical issue to one that is recognised as an important source of investment risk and of investment opportunity. Many investors now include farm animal welfare in their company engagement, in their investment research and decision-making, and in their communications with clients and with wider society.

At BNP Paribas Asset Management, we have used the Benchmark as a standard input to our investment research process since 2012. Our Sustainability Research Team annually assesses all companies within MSCI World (Developed Markets) Index against a range of relevant ESG indicators. Our environmental, social and governance (ESG) food sector analysis focuses most attention on two areas: (a) safety, health and nutrition, and (b) responsible and sustainable sourcing. Animal welfare is a consideration in both. For example, in supply chain management, our product safety management score for food producers includes three areas: policies and leadership, implementation in production and performance of suppliers. We use the BBFAW data to inform our assessments of company performance on these issues. Similarly, on safety and product quality, we assess questions such as whether or not the company has a clear position on the reduction or avoidance of antibiotics for prophylactic use, and we assess whether or not they avoid growth promoting substances.

We use the Benchmark to prioritise companies for engagement, and to identify the issues that we engage on. We challenge those companies that are poorly ranked in BBFAW to explain to us how they intend to improve their rankings. We use BBFAW data to assess whether company policies are being effectively implemented and leading to improvements in farm animal welfare performance. The BBFAW-convened Global Investor Collaboration on Farm Animal Welfare allows us to work with other investors to encourage global food companies to strengthen their management processes and performance on farm animal welfare.

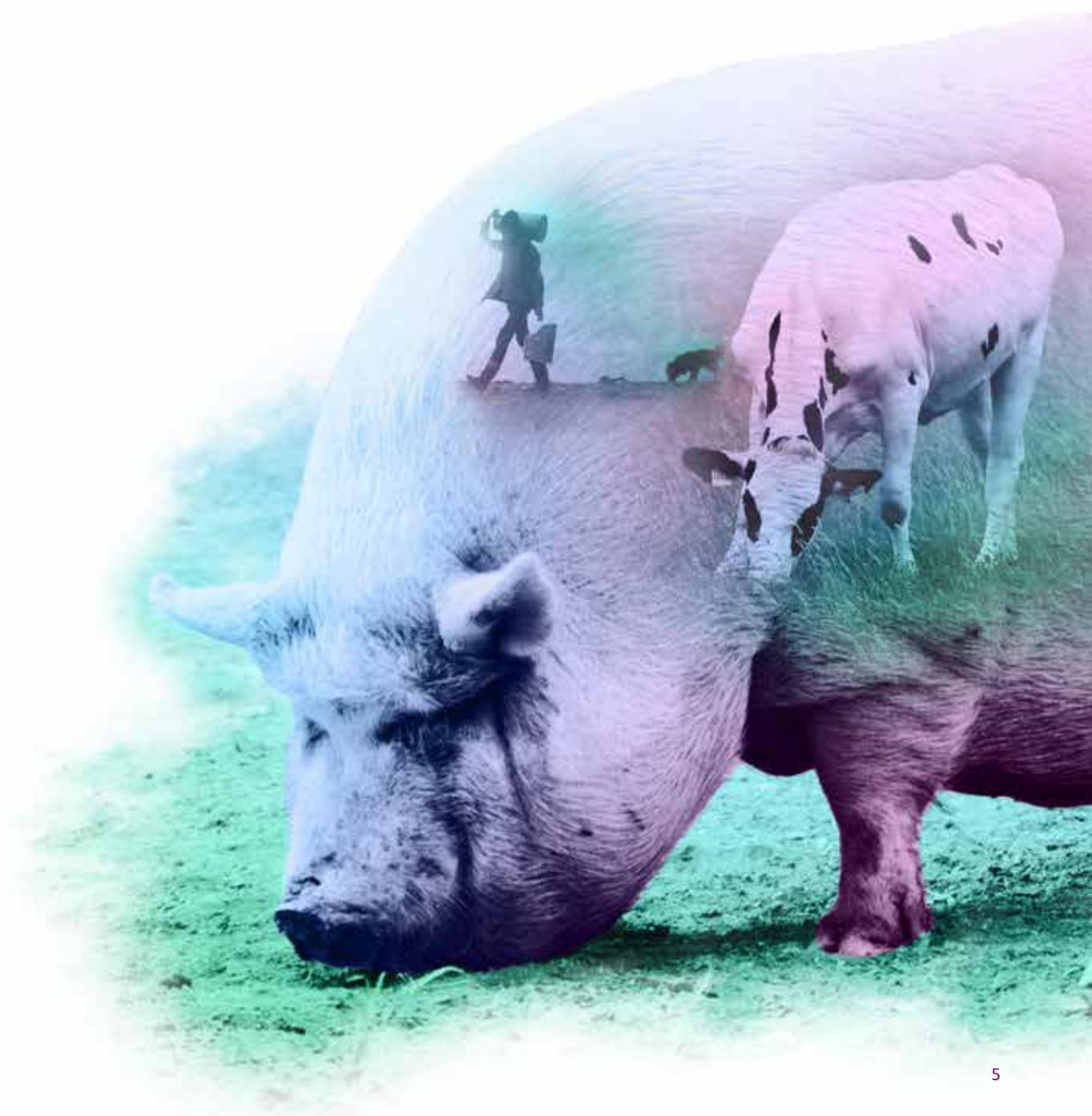
The launch of the seventh annual BBFAW report provides an opportunity to reflect on why the BBFAW has been so successful and the lessons for other benchmarks. In my view, BBFAW has been successful for four main reasons. First, it is technically credible. The close involvement of Compassion in World Farming and World Animal Protection, the two leading animal welfare NGOs, provides confidence that the Benchmark reflects current thinking on best practices on farm animal welfare. The BBFAW Secretariat complements this expertise with its deep knowledge of responsible investment and of corporate management. Second, the BBFAW Secretariat is trusted by investors, by companies and by wider stakeholders. Third, the Benchmark has been developed in close consultation with investors, and is designed to be useful to investors. Fourth, the Benchmark has longevity. It takes time for benchmarks to get established, for investors to start to use them, and for change to be seen. Ultimately, benchmarks are of most value – in investment terms, in terms of driving changes in corporate practice – when they allow investors to track changes in practice and performance over extended periods of time.

I would like to conclude by acknowledging the commitment of Compassion in World Farming and World Animal Protection and the BBFAW Secretariat to the Benchmark. We at BNP Paribas Asset Management have been proud to support this work and we look forward to continuing to work with BBFAW for many years to come.

Helena Viñes Fiestas

Deputy Global Head of Sustainability and
Head of Sustainability Research and Policy
BNP Paribas Asset Management

The 2018 Benchmark Highlights



The 2018 Benchmark highlights

This is the seventh annual report from the Business Benchmark on Farm Animal Welfare. It analyses the farm animal welfare management and performance of 150 of the world’s largest food companies, across 35 distinct, objective criteria. As such, it is the most authoritative and comprehensive global account of corporate practice on farm animal welfare.

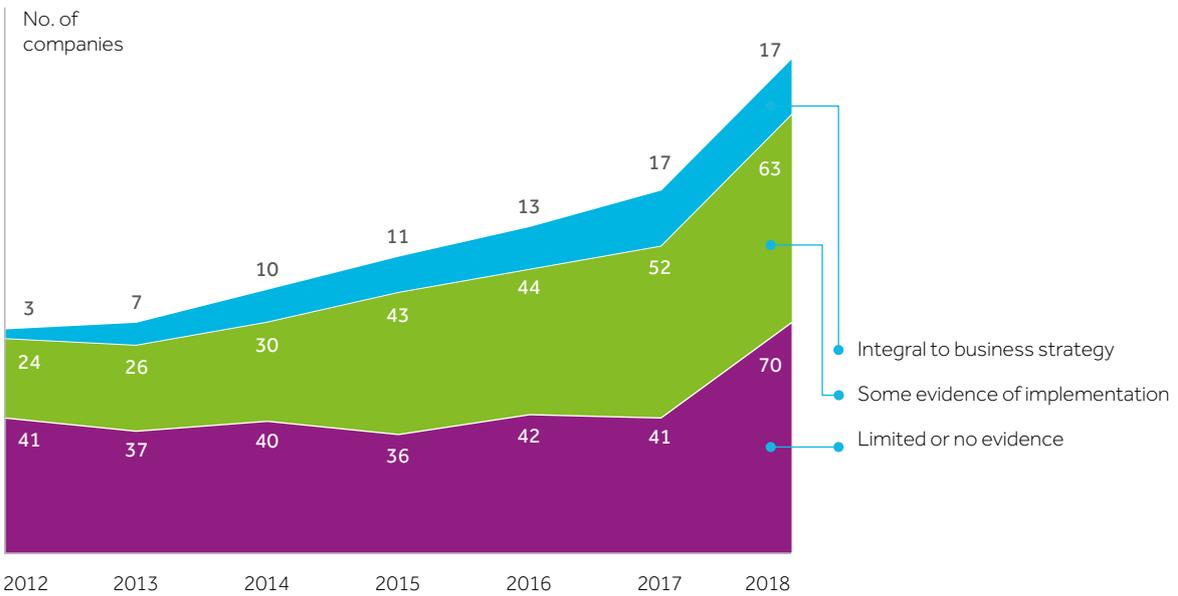
The 2018 Benchmark covers 150 global food companies:

- 52 Retailers and Wholesalers, 63 Producers and Manufacturers, and 35 Restaurants and Bars.
- 69 companies from Europe, 51 from North America and the balance from a mix of countries including Australia, Brazil, China, Japan, New Zealand and Thailand.

Key Findings

1. Farm animal welfare is now a leadership issue, with strong commercial drivers for action

Figure 1: The evolution of farm animal welfare



As shown in Figure 1, the number of companies that are considered to have farm animal welfare as an integral part of their business strategy (corresponding to Tiers 1 and 2 in the Benchmark) has grown significantly over the seven Benchmark cycles, from 3 in 2012 to 17 in 2018.

The primary drivers for companies to focus on farm animal welfare are consumer interest, risk management and business opportunities. This is a change from earlier iterations of the Benchmark when risk management was by far the most significant driver for action.

2. Companies are improving their management practices, processes and reporting on farm animal welfare

Many companies have now adopted formal farm animal welfare policies, assigned management responsibilities, set objectives and targets, and introduced audit processes to ensure that their policies are effectively implemented. Of the 150 companies covered by the 2018 Benchmark, 64 (43%) now have explicit board or senior management oversight of farm animal welfare (compared to just 22% in 2012), and 106 (71%) have published formal improvement objectives for farm animal welfare (compared to 26% in 2012). Other actions being taken by companies include using outcome measures to drive and incentivise continual improvement in farm animal welfare performance, working with suppliers to develop and implement effective farm animal

welfare policies and processes, appointing dedicated farm animal welfare managers and other specialist staff, and educating their consumers about higher animal welfare.

Our analysis of the changes in company tier rankings between 2012 and 2018 (see Table 1) highlights the progress made by the 55 food companies that have been continuously included in the Benchmark since 2012. Among these companies, 45 (82%) have moved up at least one Tier since 2012; of these, 17 (31%) moved up one Tier, 20 (36%) moved up two Tiers and 8 (15%) moved up three Tiers. These improvements are even more striking given the tightening of the Benchmark criteria and the increased emphasis on performance reporting and impact over this time.

Table 1: Tier changes 2012-2018 (trend companies*)

Down 1 Tier	No Tier change	Up 1 Tier	Up 2 Tiers	Up 3 Tiers
Subway	Autogrill Co-op Food UK Gategroup Groupe Lactalis Mars McDonald's Müller Group Starbucks Unilever	Associated British Foods Arla Foods Carrefour Compass Group Danish Crown FrieslandCampina Auchan Holdings ICA Gruppen J Sainsbury Kaufland Marfrig Mercadona Mitchells & Butlers Noble Foods Tyson Foods Umoë Gruppen Wm Morrison	2 Sisters Food Group Aldi Süd Barilla Group Camst Coop Group (Switzerland) Cremonini Groupe Danone JD Wetherspoon Lidl Marks & Spencer Metro Migros Nestlé Premier Foods REWE Group Tesco Vion Food Group Walmart Whitbread Yum! Brands	Aramark Cargill Cranswick Elior Group Greggs Groupe Casino Sodexo Waitrose
1	9	17	20	8

*Of the 68 companies covered by the 2012 Benchmark, 13 companies are no longer included in the Benchmark because they have been substantially affected by changes in ownership or business focus.

3. Close confinement is seen as a key issue

Many of the major animal welfare issues can be directly attributable to the systems in which animals are raised. Close confinement systems are associated with higher injury and mortality rates, as well as higher prevalence of aggression and other abnormal and stress-related behaviours. Furthermore, antibiotics are widely used in these systems to compensate for the fact that the extreme close proximity of animals to each other facilitates the spread of infectious diseases. The close confinement of animals is a key contributor to the wider societal issue of antimicrobial resistance¹.

One hundred and fifteen companies (77%), a similar percentage to the 79% in 2017, have made commitments to the avoidance of close confinement in one or more of the major markets in which they operate. Of these, five have made universal commitments to the avoidance of close confinement covering all relevant geographies, species and products, and 89 companies have made clearly defined commitments for specific geographies and/or specific species. Particular progress has been made in relation to commitments to cage-free laying hens, the phasing out of sow stalls/gestation crates, and the setting of lower maximum stocking densities for broiler chickens. These have been the species and the confinement systems that have received most attention from consumers and from NGOs in recent years.

82%

of companies have moved up at least one tier since the first Benchmark in 2012

4. Reporting on farm animal welfare performance is lagging

When we first introduced performance-based questions in 2014, we were interested to see whether companies had effective processes in place for ensuring that their policy commitments had been effectively implemented. While important, policy commitments on their own provide no guarantees of performance; companies, and their stakeholders, need to be sure that policies and associated management systems and processes deliver the desired outcomes in terms of farm animal welfare performance.

While we are seeing a gradual improvement in the proportion of companies reporting animal welfare performance data, the quality of performance reporting – in terms of consistency, comparability and coverage – is still not fit for purpose. Despite 77 companies (51%) now reporting at least some animal welfare performance data, it is often not possible to understand how companies are translating policy commitments into action, nor is it possible to get an accurate picture of the welfare impact on animals. In turn, this makes it very difficult to assess the quality of a company's management systems or to answer questions such as whether a company is effectively implementing its policies, whether it is delivering on its objectives and targets, whether it is effectively managing the risks and opportunities presented by farm animal welfare, or whether it is improving the welfare of the animals in its operations and supply chain. It is also not possible to make meaningful performance comparisons between companies, or to understand which companies are leading on delivering positive animal welfare impacts.

5. Lack of knowledge (e.g. on the wider business and marketing benefits of higher welfare) and consumer willingness to pay are the key barriers to progress

Lack of knowledge and customer willingness to pay remain the key barriers to food companies adopting higher standards of farm animal welfare and affects the level of investor interest in the issue.

In our 2018 survey of how companies use the Benchmark, 82% of respondents identified customer willingness to pay as a barrier to adopting higher standards of farm animal welfare. Companies also identified the absence of a compelling business case for adopting higher welfare standards, and a general lack of awareness of the wider business and marketing benefits of higher welfare as key barriers to progress.

We note that progress is being made to address these barriers. For example, many companies now provide financial incentives (e.g. higher pricing, extended-term contracts) to adopt higher standards as well as support with capital investment, and an increasing number provide suppliers with access to education, training, marketing and technical support on farm animal welfare.

115

global food companies
have made commitments
to the avoidance of close
confinement in one or
more of the major markets
in which they operate

Addressing the barriers to farm animal welfare is a key objective of the Business Benchmark on Farm Animal Welfare. Over the next two years, we will focus on:

1. Strengthening the signals being sent by investors to food companies about the importance of farm animal welfare as a business issue. We will do this through:
 - Increasing the number of investor signatories to the Global Investor Statement on Farm Animal Welfare.
 - Increasing the number of investors that participate in the Global Investor Collaboration on Farm Animal Welfare.
 - Encouraging investors to proactively raise the issue of farm animal welfare with the food companies in which they are invested.
2. Raising investor awareness of the investment risks and opportunities associated with farm animal welfare. We will focus particular attention on the investment community in North America, Latin America and Asia.
3. Encouraging companies to improve their practices and reporting on farm animal welfare, with a particular emphasis on encouraging better consumer education and better reporting on farm animal welfare impacts. We will encourage investors and other stakeholders to support these efforts in their engagement with companies.
4. Building relationships with other stakeholders – in particular, intergovernmental agencies, standards bodies and financial institutions – to encourage them to integrate BBFAW's criteria into their lending and standards criteria.
5. Exploring the potential to develop country and market-specific benchmarks.
6. Consider increasing the emphasis we place on improving animal welfare performance in the Benchmark itself.

1. The 2018 Benchmark

An overview



The Benchmark structure

This is the seventh Business Benchmark on Farm Animal Welfare (BBFAW) report². As with previous Benchmarks, it analyses the farm animal welfare policies, management systems, reporting and performance of the world's largest food companies.

The Benchmark assesses companies across four pillars as indicated in Table 1.1³. While this is the same structure as in previous years, the performance reporting and impact section now accounts for 35% of company scores, compared to 24% in 2017, in line with our long-term goal to increase the Benchmark's emphasis on performance impact⁴.

Table 1.1: Benchmark elements

Pillar	Key elements	% weighting (2017 weightings in brackets)
1. Management Commitment	<ul style="list-style-type: none"> • Explanation of why farm animal welfare is important to the business. • Statement of overarching farm animal welfare policy that sets out core principles and beliefs on farm animal welfare and that explains how these are addressed and implemented throughout the business. • Statement of specific policy positions on key welfare concerns such as close confinement, routine mutilations, antibiotic usage, pre-slaughter stunning, and long-distance live transportation. 	26 (30)
2. Governance and Management	<ul style="list-style-type: none"> • Allocation of responsibilities for day-to-day management and oversight of the company's farm animal welfare policy. • Adoption of farm animal welfare-related objectives, targets and performance indicators, including the allocation of resources and responsibilities for the delivery of these. • Establishment of appropriate control systems such as employee training on farm animal welfare, corrective action processes, auditing and supply chain monitoring. 	28 (33)
3. Leadership and Innovation	<ul style="list-style-type: none"> • Involvement in research and development programmes to advance farm animal welfare. • Involvement in industry or other initiatives directed at improving farm animal welfare. • Promotion of higher farm animal welfare amongst customers or consumers. 	11 (13)
4. Performance Reporting and Impact	<ul style="list-style-type: none"> • Reporting on farm animal welfare performance measures such as the proportion of animals that are free from confinement and from routine mutilations, the proportion of animals that are pre-slaughter stunned, and permitted live transport times. • Impact on key farm animal welfare issues, such as the actual proportion of animals that are free from close confinement, the proportion of animals that are free from routine mutilations, the proportion of animals that are pre-slaughter stunned and the proportion of animals that are transported within specified maximum journey times. 	35 (24)

The benchmarking process⁵

Companies were assessed solely on the basis of information published at the time of the assessments (August/September 2018). The preliminary company assessments were peer reviewed and quality checked prior to a technical review conducted by Compassion in World Farming and by World Animal Protection in early October. Following this, the BBFAW companies were invited during October and November 2018 to review their draft assessments to check the factual accuracy of the assessments and to ensure that all relevant information had been considered by the assessor.

43

new companies added
to the 2018 Benchmark

Companies covered

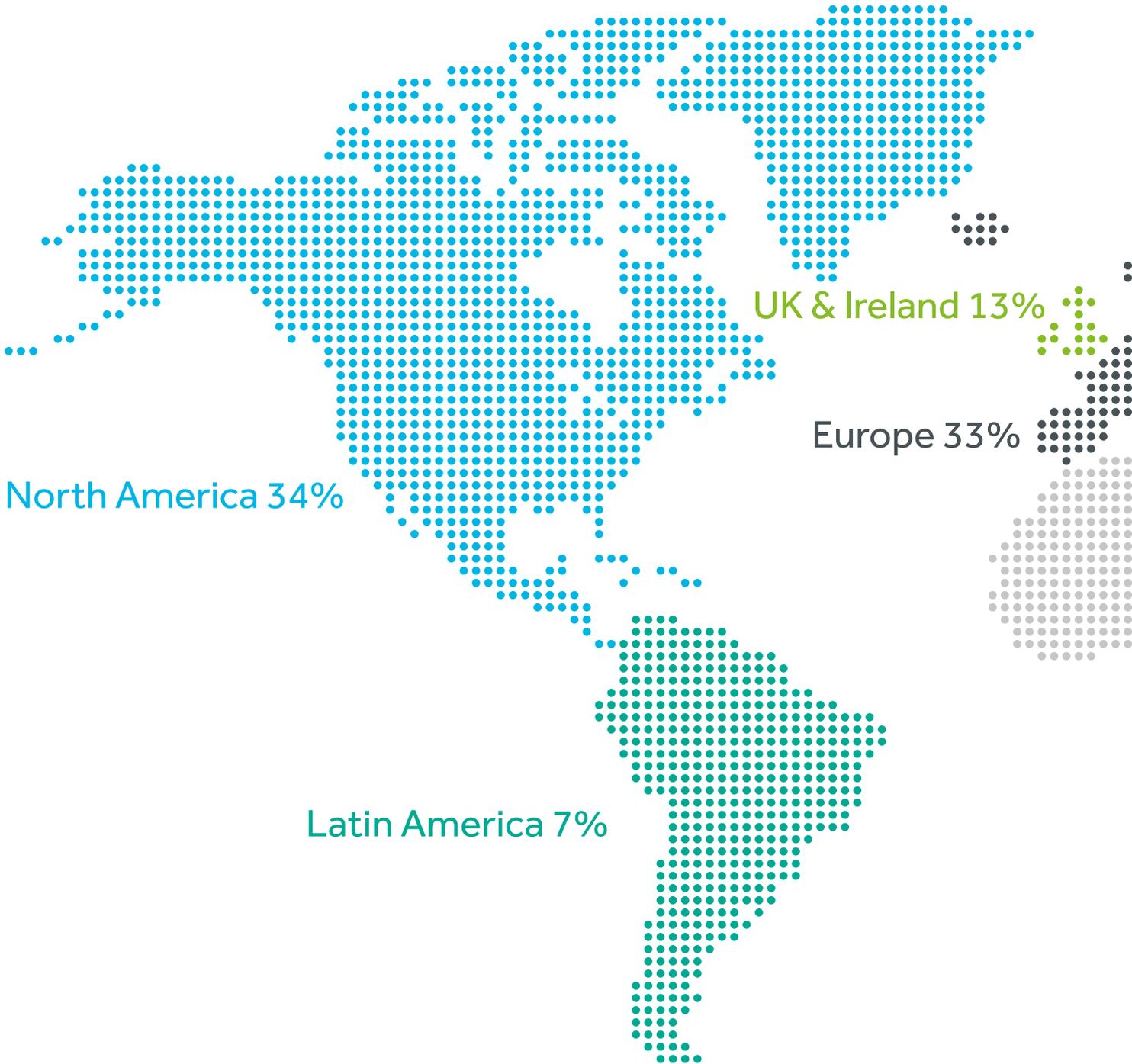
In line with the BBFAW's longer-term objective to progressively broaden the coverage of the Benchmark, both in terms of the number of companies and the geographic regions covered, we have increased the number of companies from 110 in the 2017 Benchmark to 150 in the 2018 Benchmark. We removed three companies⁶ and added 43 companies (based on their scale and significance). A full list of the companies covered by the 2018 Benchmark is provided in Appendix 2.

Table 1.2: Companies added to the 2018 Benchmark

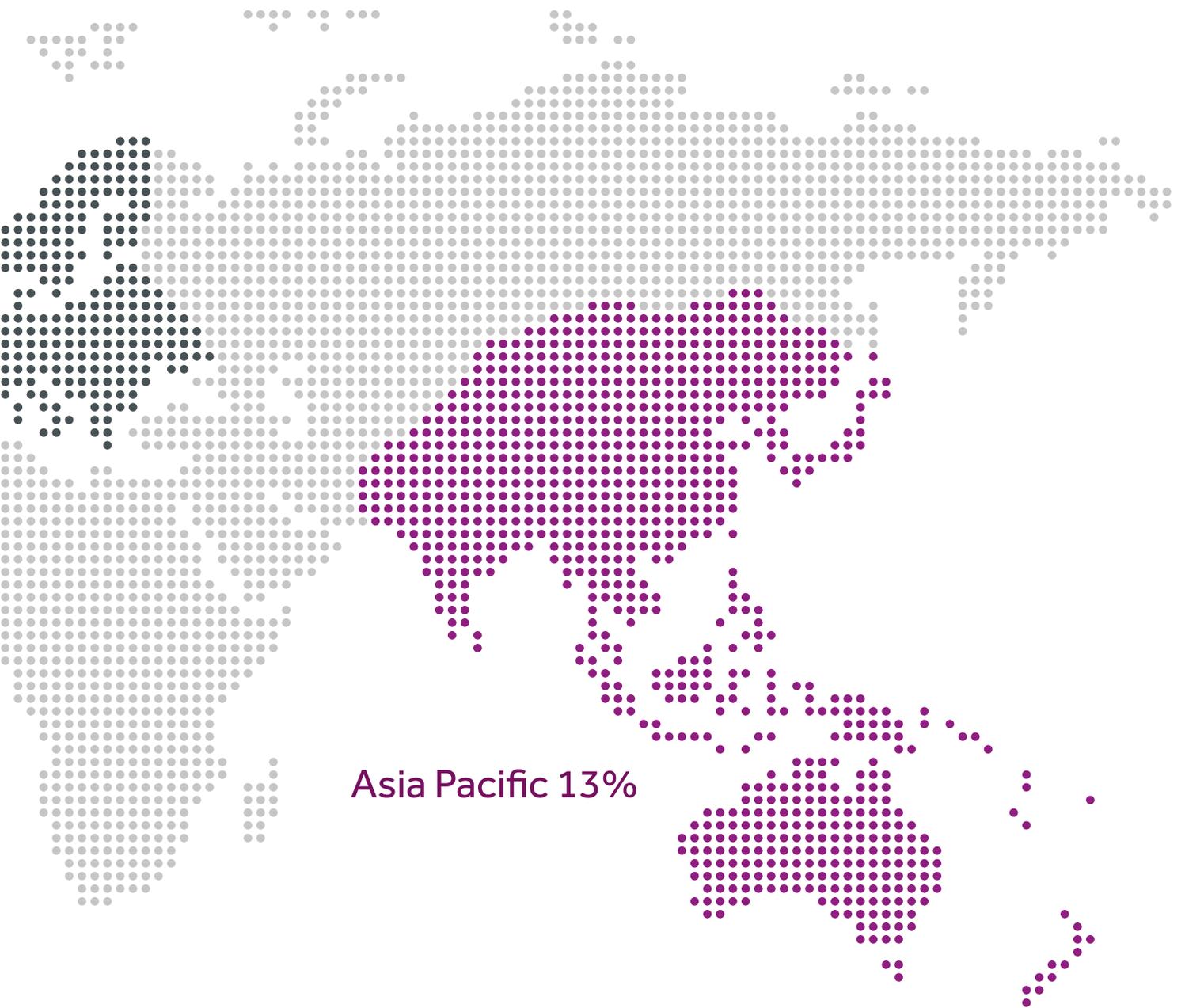
Retailers and Wholesalers	Producers and Manufacturers	Restaurants and Bars
Amazon/Whole Foods Market	Agro Super	CKE Restaurants
BJ's Wholesale	Bimbo	CNHLS
C&S Wholesale	Campbell Soup Company	Cracker Barrel
Cencosud	China Yurun Group Limited	Dico's
Colruyt	Chuying Agro-Pastoral Group	Habib's
Conad Consorzio Nazionale	Cooke Seafood Inc	Papa John's Pizza
Couche-Tard	Cooperativa Centrale Aurora	The Cheesecake Factory
Empire Company/Sobey's	Alimentos	
H E Butt Company	Cooperl Arc Atlantique	
IKEA (Inter IKEA Group)	Hershey Co	
Jeronimo Martins	Hilton Food Group	
Super Valu	Industrias Bachoco	
Systeme U Generale	Kerry Group	
	Maple Leaf Foods	
	Marine Harvest ASA	
	Maruha Nichiro	
	Meiji Holdings	
	Minerva Foods	
	Nippon Meat Packers	
	Plukon Food Group	
	Saputo Inc	
	Seaboard Corp	
	Tönnies Group	
	US Foods	

The net effect of these changes was to increase the proportion of benchmarked companies (relative to the 2017 Benchmark) from the North American, Latin American and Asia Pacific regions, and to slightly lower the proportion of companies from Europe (see Figure 1.1 for an overview of the geographic distribution of the companies covered by the 2018 Benchmark). The total number of countries covered by the BBFAW increased from 18 in 2017 to 23 in 2018.

Figure 1.1: Geographic distribution of the companies covered by the 2018 Benchmark



In terms of the distribution of companies by sub-sector, the new changes mean that the 2018 Benchmark covers: 52 Retailers and Wholesalers (compared to 40 in 2017), 63 Producers and Manufacturers (40 in 2017) and 35 Restaurants and Bars (30 in 2017). The reason for increasing the number of producers and processors relative to the other two sub-sectors, is that their direct animal footprint is relatively more significant. Using a similar logic, we have added retailers in preference to restaurants, because retailers are considerably larger and are, therefore, more likely to have a greater animal footprint and greater purchasing influence.



2018 Benchmark coverage

50 largest food retailers globally with annual revenues in excess of **US\$10 billion**



TOP 40 global producers including **top 10** poultry producers with annual revenues in excess of **US\$4.6 billion**



TOP 30 restaurants and bars globally with annual revenues in excess of **US\$1 billion**



2. The 2018 Benchmark Results



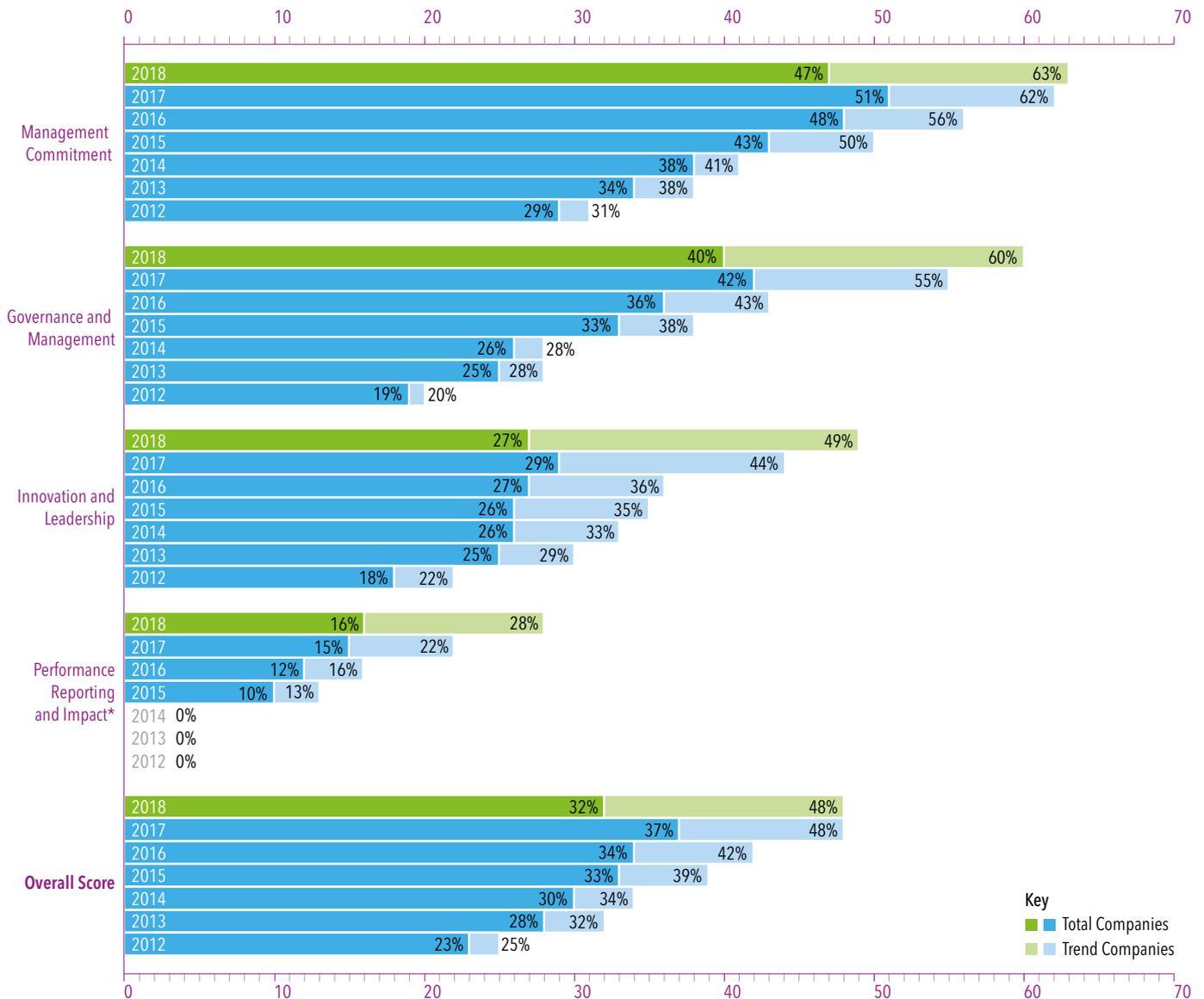
Overall results

The headline finding from the 2018 Benchmark is that farm animal welfare leadership and improved management practices are starting to become institutionalised, with more than half of the world's largest food companies focusing efforts to ensure that farm animal welfare is effectively managed.

The average score for all companies covered in the 2018 Benchmark was 32%. While this is lower than the average score of 37% in 2017, the figure is skewed downward by the 43 companies added to the 2018 Benchmark and the increased weighting given to performance reporting and impact. The new companies achieved an average score of just 16% and the performance weighting increased from 24% to 35%. A more accurate picture of the performance of food companies on farm animal welfare can be obtained by excluding the new companies (see Figure 2.1). This shows an overall average score of 38% (when scored at the higher performance weighting) or 41% (when scored at the lower performance weighting for comparison).

Farm animal welfare leadership and improved management practices are starting to become institutionalised

Figure 2.1 Average scores (total companies vs trend companies 2012-2018)[†]



*Introduced in 2014 and incorporated into company scores for the first time in 2015

[†]Of the 68 companies covered by the 2012 Benchmark, 13 companies are no longer included in the Benchmark because they have been substantially affected by changes in ownership or business focus.

In our 2018 survey of the companies covered by the Benchmark, 73% of the food companies that responded stated that they were paying more attention to farm animal welfare than in previous years. They reported that they had taken a variety of actions such as:

- Using outcome measures to drive and incentivise continual improvement in their farm animal welfare performance.
- Taking action on specific farm animal welfare issues, with many acting on close-confinement (e.g. cage-free eggs, sow stalls/gestation crates), routine mutilations (e.g. castration of pigs) and slaughter practices.
- Publishing formal policies on farm animal welfare and working with suppliers to develop and implement these policies and commitments.
- Providing internal training on farm animal welfare and raising awareness of farm animal welfare across their business.
- Extending the scope of their farm animal welfare efforts to encompass more products, more species and animal derivatives.
- Appointing dedicated farm animal welfare managers and other specialist staff.
- Strengthening their reporting and their customer engagement on farm animal welfare.
- Increasing their sales of higher welfare products.

Company rankings and performance

We see this picture of overall improvement reflected in the performance of the individual companies covered by the Benchmark. As in previous Benchmarks, we have grouped the assessed companies into one of six tiers, based on their overall percentage scores, as indicated in Table 2.1. Figure 2.2 presents a composite picture of company scores, while Table 2.2 shows how the number of companies in each tier has changed over the period 2012 to 2018.

Table 2.1: BBFAW Tiers

Tier	Percentage Score
1. The company has taken a leadership position on farm animal welfare	>80%
2. The company has made farm animal welfare an integral part of its business strategy	62 – 80%
3. The company has an established approach to a farm animal welfare but has more work to do to ensure it is effectively implemented	44 – 61%
4. The company is making progress on implementing its policies and commitments on farm animal welfare	27 – 43%
5. The company has identified farm animal welfare as a business issue but provides limited evidence that it is managing the issue effectively	11 – 26%
6. The company provides limited if any evidence that it recognises farm animal welfare as a business issue	<11%

73%

of global food companies
are paying more attention
to farm animal welfare

Figure 2.2: Company rankings



Table 2.2: Number of companies by Tier 2012-2017

Tier	Number of Companies						
	2012	2013	2014	2015	2016	2017	2018
1. The company has taken a leadership position on farm animal welfare	0	2	3	4	6	5	5
2. The company has made farm animal welfare an integral part of its business strategy	3	5	7	7	7	12	12
3. The company has an established approach to a farm animal welfare but has more work to do to ensure it is effectively implemented	6	10	14	16	22	29	34
4. The company is making progress on implementing its policies and commitments on farm animal welfare	18	16	16	27	22	23	29
5. The company has identified farm animal welfare as a business issue but provides limited evidence that it is managing the issue effectively	18	14	19	17	24	20	37
6. The company provides limited if any evidence that it recognises farm animal welfare as a business issue	23	23	21	19	18	21	33
Total	68	70	80	90	99	110	150

These figures tell us that farm animal welfare continues to be recognised as a strategic opportunity by a significant number of global food companies; the 17 companies in Tiers 1 and 2 are those that have taken leadership positions on farm animal welfare and have made farm animal welfare an integral part of their business. These figures – specifically, the 63 companies in Tiers 3 and 4 – also tell us that an increasing number of global food companies are making substantial progress in implementing their policies and commitments on farm animal welfare, although they are not yet at the point where farm animal welfare can be considered integral to their business strategy.

The Benchmark data confirm that leadership and improved management practices are starting to become institutionalised. Of the 150 companies covered by the Benchmark, 64 (43%) now have explicit board or senior management oversight of farm animal welfare, and 106 (71%) now have published formal improvement objectives for farm animal welfare. These are significant changes from earlier Benchmarks; in the 2012 Benchmark, only 22% of companies reported on senior management oversight of farm animal welfare and only 26% had published formal improvement objectives for farm animal welfare.

They also tell us that we have a long way to go. Seventy of the 150 companies appear in Tiers 5 and 6, indicating that these companies provide little or no information on their approach to farm animal welfare. To an extent, this reflects the fact that we have added 43 new companies to the Benchmark, with 36 of these new companies appearing in Tiers 5 and 6. However, it also reflects the reality that we have much to do if we are to get to the point where farm animal welfare is well managed by the food industry globally.

Despite the increased emphasis on performance reporting and impact, 19 of the 107 companies assessed in 2017 (see Table 2.3) improved by at least one Tier in the 2018 Benchmark. While this is welcome, 12 companies fell by at least one Tier (see Table 2.4). We had recognised that the increased weighting on performance reporting and impact would create a downward pressure on most companies' scores and had estimated that 23 companies covered by the 2017 Benchmark would fall by at least one Tier. We wrote to these companies in advance of the 2018 Benchmark alerting them to the changes and encouraging them to strengthen their performance reporting. The fact that only five of the 23 companies at risk fell by one Tier, and of these only two companies actually achieved lower scores in the performance reporting and impact section, suggests that companies responded to our communications. More generally, given that approximately half of the number of companies predicted to fall by at least one Tier did so, implies that companies are continuing to respond to the signals being sent by the BBFAW and are working hard to either maintain or improve their ratings.

19
companies have improved by at least one Tier since 2017

Analysis of impact of increased weighting of performance reporting and impact section

Of the 23 companies at risk from the increased weighting of the performance reporting and impact questions, six maintained the same score as in 2017, 15 improved their scoring, and just two companies lost points. We note that several companies are paying particular attention to their performance reporting and impact, with some companies increasing their scores in this section by as many as 27 points against 2017.

Table 2.3: Companies improving by at least one Tier between 2017 and 2018

Retailers and Wholesalers	Producers and Manufacturers	Restaurants and Bars
Casino	CP Foods	Chipotle Mexican Grill
Groupe Auchan	Group Danone	Dunkin' Brands
Les Mousquetaires	Groupe Lactalis	Whitbread
Lidl	Groupo Veronesi	Yum! Brands
Publix Supermarkets	Kraft Heinz	
Wm Morrison	LDC	
Wesfarmers	Noble Foods	
	Vion Food Group	

Table 2.4: Companies falling by one Tier between 2017 and 2018

Retailers and Wholesalers	Producers and Manufacturers	Restaurants and Bars
Ahold Delhaize	BRF	McDonald's
Kaufland	Danish Crown	Subway
Migros	Dean Foods	
Sysco	General Mills	
Walmart	JBS	

Figure 2.3 presents the results of the 2018 Benchmark by sub-sector. The most notable finding is that for the first time, all three sub-sectors achieved virtually the same average overall score (31% for producers and manufacturers, 32% for retailers and wholesalers, and 32% for restaurants and bars). This levelling down is partly attributable to the fact that the restaurant and bars sub-sector continues to improve and has closed the gap on the other two sub-sectors, and partly due to the fact that most of the new companies (84% of which appear in Tiers 5 and 6) are in the retailer and wholesaler and the producer and manufacturer sub-sectors, and these additions have exerted a significant downward influence on the average scores.

Figure 2.3: Sub-sector comparison 2018

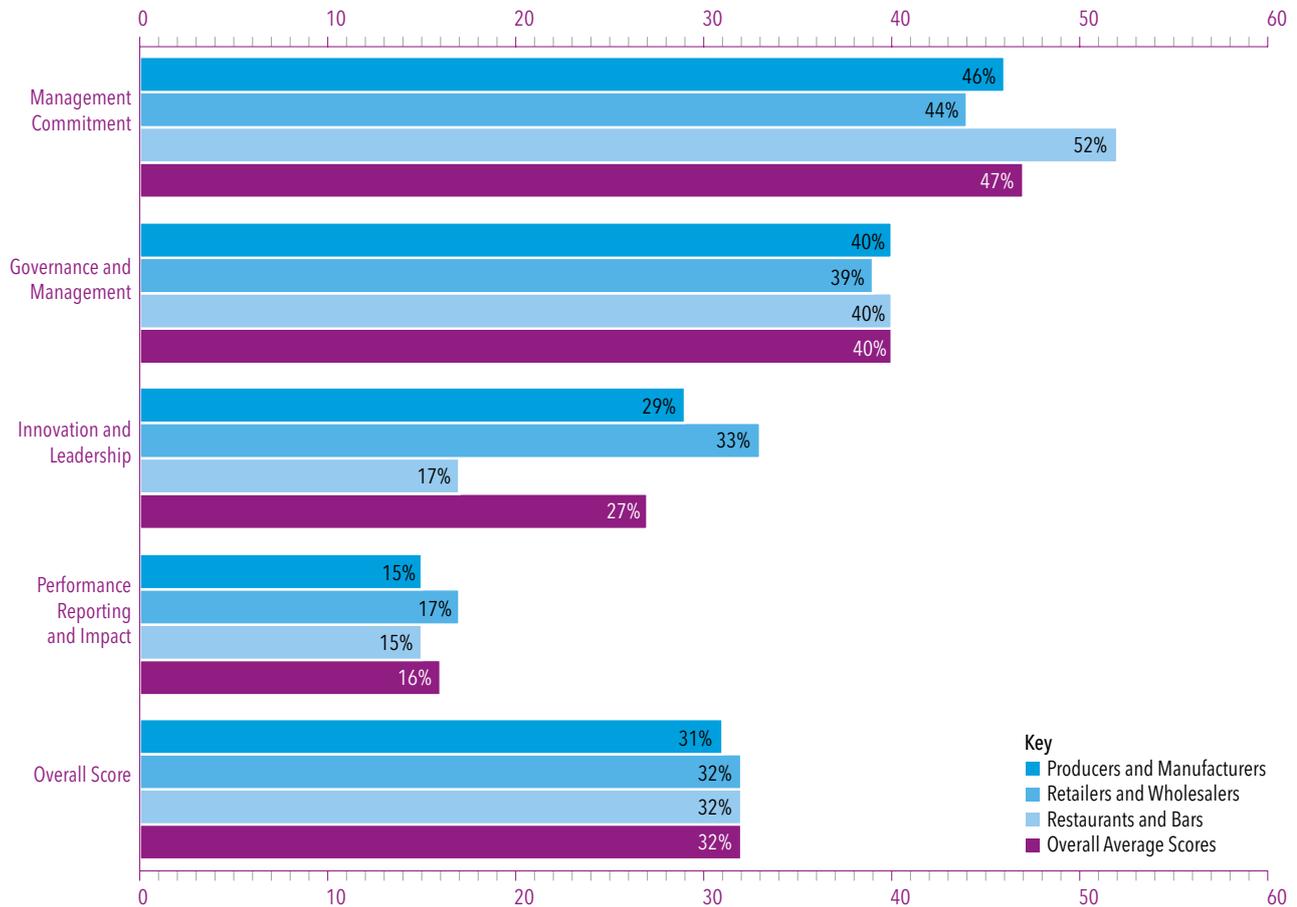


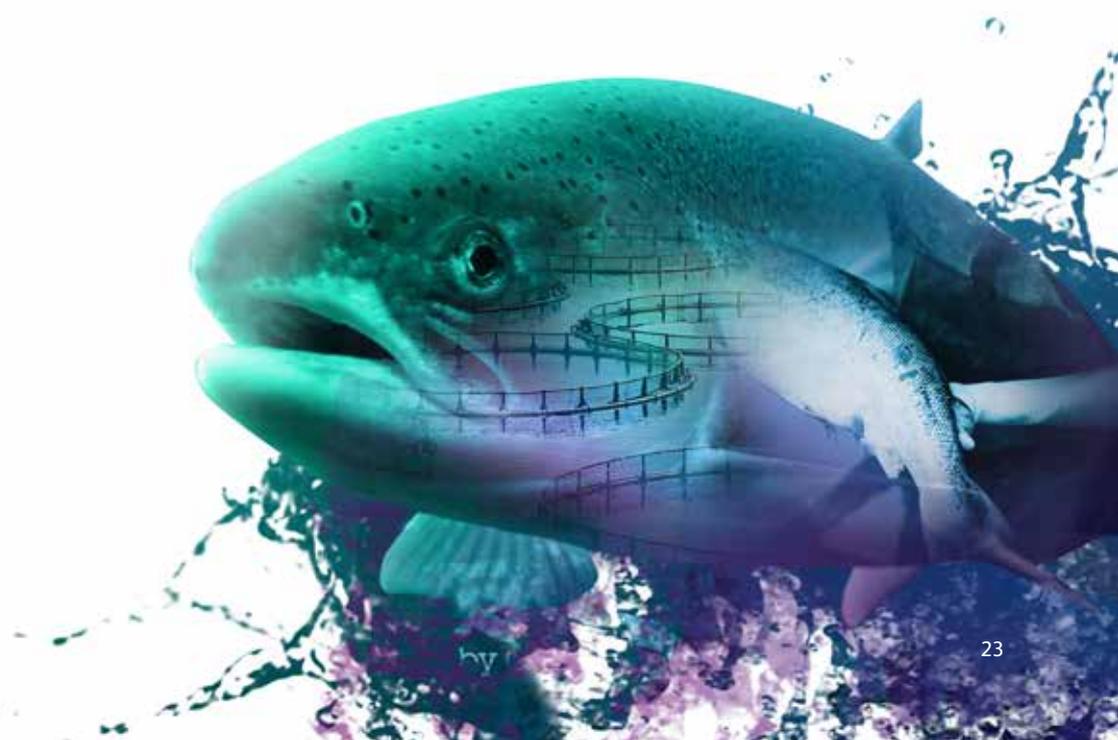
Figure 2.4: Retailers and Wholesalers



Fig 2.5: Restaurants and Bars

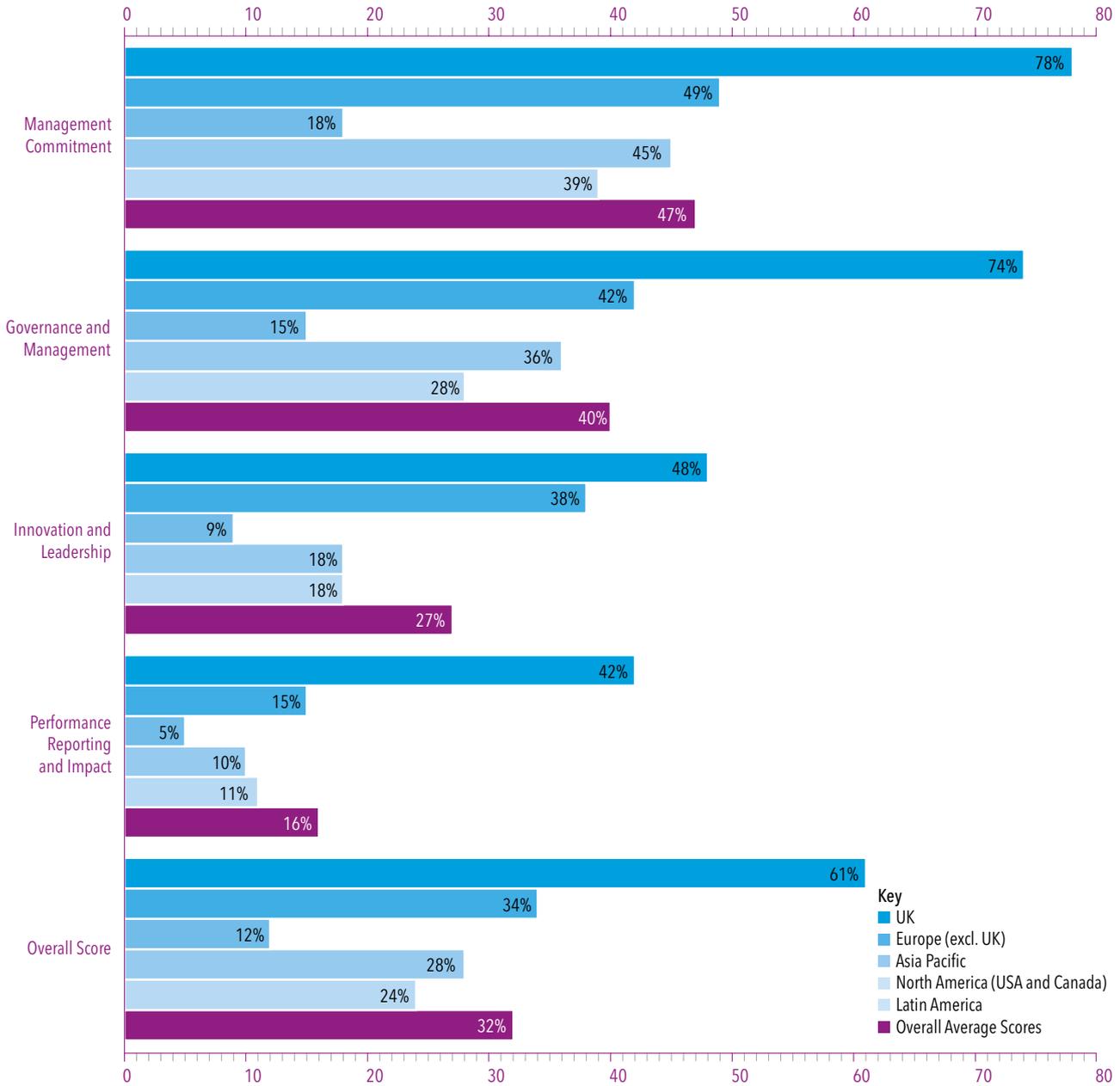


Figure 2.6: Producers and Manufacturers



We were keen to understand whether there is a difference between the companies as a result of their country of origin. The results are presented in Figure 2.7. The central finding, reflecting the findings of previous Benchmarks, is that the average performance of the UK companies covered by the 2018 Benchmark is significantly higher than that for the North American and European (excluding the UK) companies. While the average score for the 19 companies from the Asia-Pacific region is low, we note that eight of the new companies in the 2018 Benchmark were from this region and that most of the remaining companies have only been covered by the Benchmark since 2015.

Figure 2.7: Geographic comparison

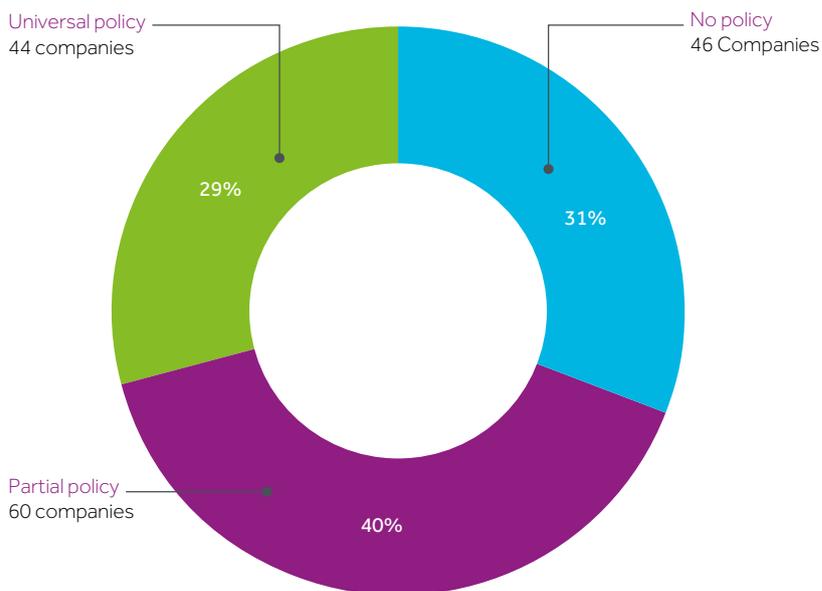


Farm animal welfare policies

One hundred and thirty (87%) of the 150 companies covered by the 2018 Benchmark acknowledge farm animal welfare as a relevant business issue. A majority, 69%, now have formal overarching policies on farm animal welfare. An increasing number of these policies commit organisations to common standards across all relevant geographies and species, although these aspirations towards universality are often tempered by the realities of supply and by companies' ability to exert influence over their suppliers.

While it is encouraging that so many companies now have formal policies, Figure 2.8 shows that the scope (or coverage) of many of these policies is limited to specific geographies, specific species and/or specific brands, or that it is not possible to define what the actual scope of the policy is.

Figure 2.8: Formal animal welfare policies

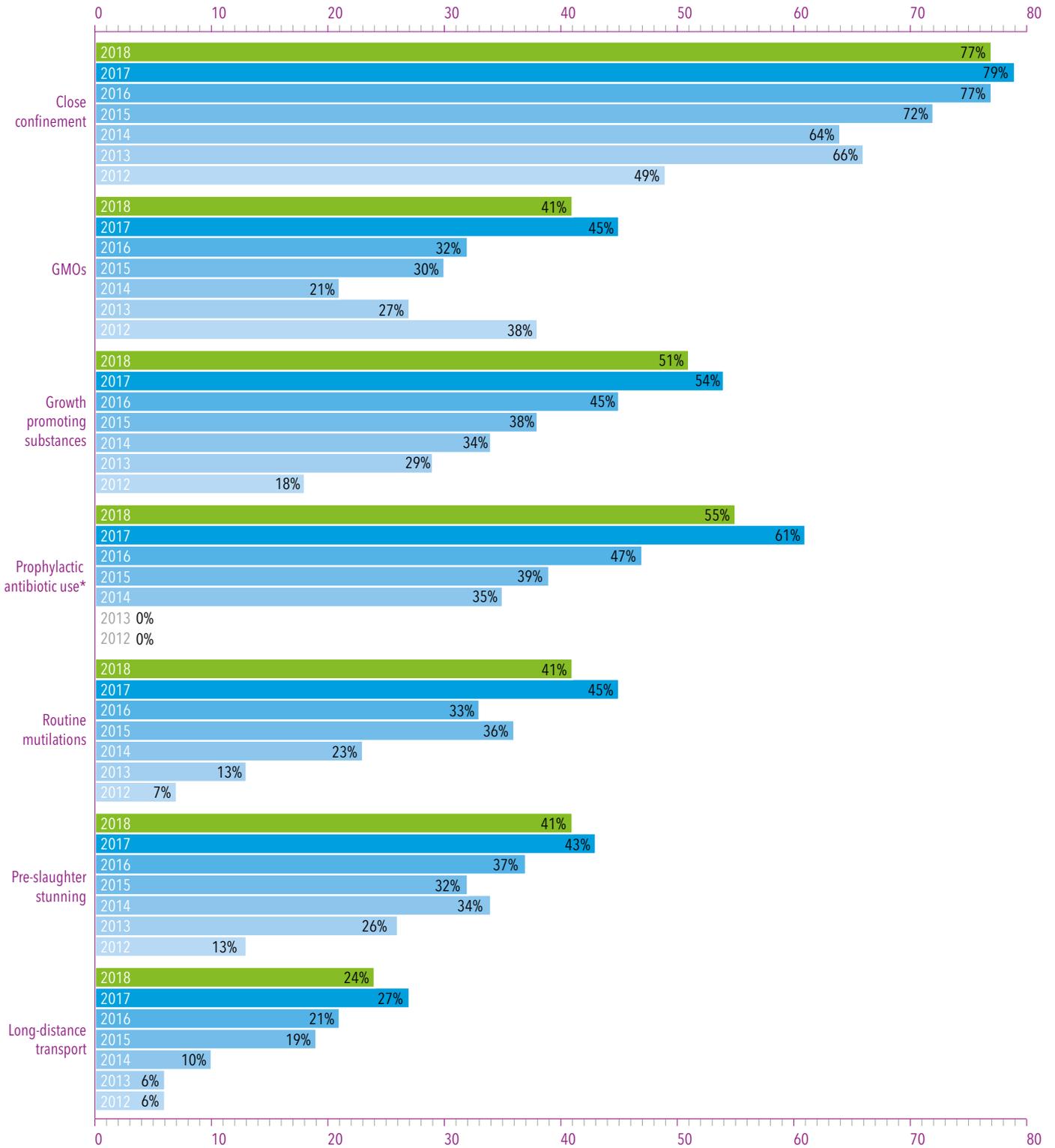


In practice, different species and different farm animal welfare issues receive different levels of attention. Companies tend to prioritise those species and issues where they have the most significant impact, where they have the most influence and where there is the greatest level of public or consumer attention. This is illustrated in Figure 2.9; the high proportion of companies with policies on close confinement reflects the significant and sustained NGO campaigning pressure and media attention on the issue of close confinement (in particular in relation to eggs from caged hens), the use of sow stalls/gestation crates, and, more recently, stocking densities for broiler chickens. These campaigns have led to many global food companies publishing commitments to phase out eggs from caged hens, to eliminating sow-stalls and to reducing the maximum stocking density for broiler chickens in specified geographies. It is important to note that these commitments are rarely universal in scope but tend to be confined to those countries or regions where these issues have received the most attention.

31%

of companies have
no formal farm animal
welfare policy

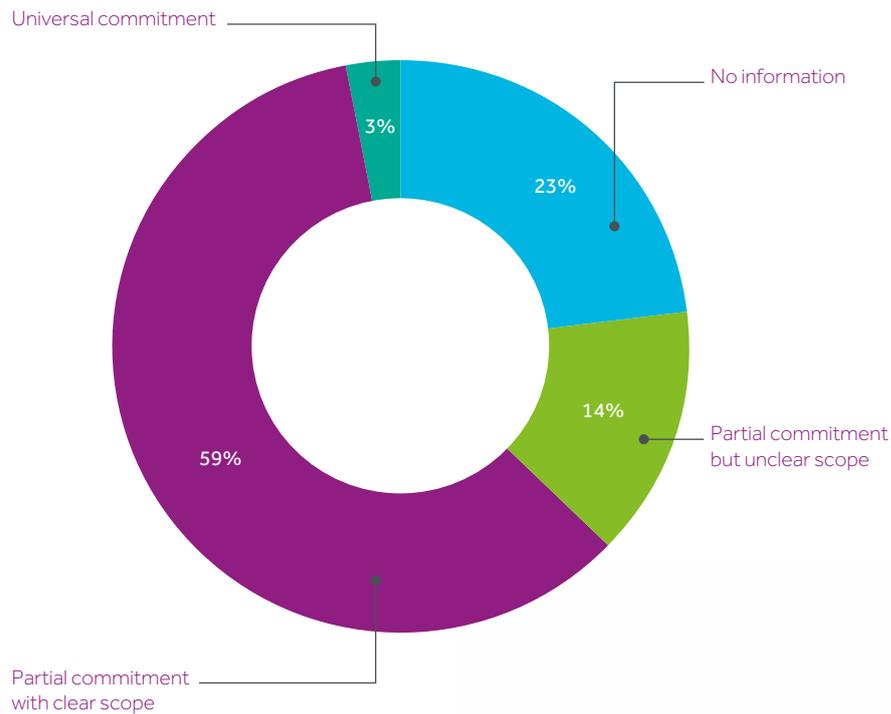
Figure 2.9: Percentage of companies with specific policies on farm animal welfare issues



*Reported for the first time in 2014

Figure 2.10: Percentage* of companies with commitments to the avoidance of close confinement

*Figures rounded to the nearest full percentage point.



Our analysis of the content of these policies confirms the drivers of change, with many of the commitments limited to those markets where pressure from NGOs, consumers, regulators and, increasingly, investors, are the greatest. For example, in the case of close confinement, 115 companies (77%) have made commitments to the avoidance of close confinement, typically in North America and/or in Europe. While only 5 (3%) of the 150 companies have made universal commitments to the avoidance of close confinement (covering all relevant species, geographies and products)⁷, some 89 companies (59%) have specific, clearly defined commitments relating to key geographies and species.



Box 2.1: Examples of company commitments to the avoidance of close confinement

WH Group subsidiary transitions to 100% group housing⁸

In January 2007, Smithfield Foods announced a voluntary, ten-year programme to phase out individual gestation stalls on its company-owned sow farms and to replace the gestation stalls with group pens. By December 2015, the company had completed conversions to group pens for over 81.8% of its sows on company-owned farms in the United States. By the end of 2017, all pregnant sows on Smithfield's company-owned farms globally were housed in group-housing systems. This included the company's operations in Poland, Romania, and joint ventures in Mexico, which were converted five years ahead of schedule. In addition, WH Group recommends that all its contract sow growers in the United States complete a transition to group housing by the end of 2022.

This strategic commitment by WH Group involved an investment of \$360 million to transition all company-owned sows to group housing. The company believes this transition will help it meet increased customer and consumer demand for pork produced according to the highest industry standards.

Chipotle commits to reducing stocking densities for broiler chickens⁹

For more than 15 years, Chipotle has committed to sourcing from farmers and ranchers who follow animal welfare practices that far exceed industry standards, while avoiding the use of unnecessary antibiotics and synthetic hormones.

In 2018, Chipotle identified the opportunity to further improve its chicken welfare standards by addressing a number of issues critical to the welfare of chickens raised for meat. It identified the most critical issues as: welfare outcomes resulting from fast-growing chickens, environments in the facilities that house chickens, the space allotted to each animal, and the manner in which chickens are slaughtered.

Chipotle will partner with its suppliers and the farmers in their networks to build the market for chicken raised in a way that addresses these issues. In addition, it will engage with animal scientists and other animal welfare experts, including organizations such as Compassion in World Farming and the Humane Society of the United States to adopt standards that are aligned with the new requirements of the Global Animal Partnership's standard for broiler chickens. As such, the company will work to achieve the following goals:

1. Improved breeding. Transition to strains of birds bred for measurably improved welfare outcomes.
2. Providing more space. Provide animals with more space by reducing maximum stocking density to 6 lbs per square foot.
3. Living conditions. Provide chickens with housing that includes improved lighting, litter and floor enrichments that allow chickens to express natural behaviours.
4. Slaughter. Process chickens in a manner that utilises a multi-step controlled-atmosphere processing system.

All suppliers will be required to demonstrate compliance with these standards via audits by Chipotle's internal Animal Welfare team and by third party auditors. These audits will be a continuation of Chipotle's established animal welfare audit programme to ensure that suppliers are meeting the company's expectations for quality, animal welfare, and other considerations.

Chipotle is working to achieve these objectives by 2024. However, the company recognises that the changes it envisions for its chicken supply will require substantial investment throughout the supply chain, with no single buyer of chicken accomplishing them alone. The investment will come from the company working with its suppliers and their growers, and with like-minded companies in the restaurant, food service, and food retail industries, to ensure that improvements to broiler welfare are made in a way that is economically viable. Chipotle plans to report on its progress on an annual basis.

Alongside company commitments to avoiding the close confinement of animals, we are seeing similarly strong trends in company commitments to other key welfare issues. Given the downward effect of the introduction of 43 new companies, the figures indicate that companies are continuing to strengthen their management commitments to addressing key welfare issues. Specifically:

- 77 companies (51%) have made public commitments to the avoidance of growth promoting substances.
- 83 companies (55%) have made public commitments to the reduction or avoidance of routine antibiotics.
- 62 companies (41%) have made public commitments to the avoidance of routine mutilations.
- 62 companies (41%) have made public commitments to the avoidance of animals that have not been stunned prior to slaughter.
- 61 companies (41%) have made public commitments to the avoidance of genetically-modified or cloned animals.
- 36 companies (24%) have made public commitments to limit live transportation to 8 hours or less.

Figure 2.11: Percentage of companies with commitments to the avoidance of growth promoting substances

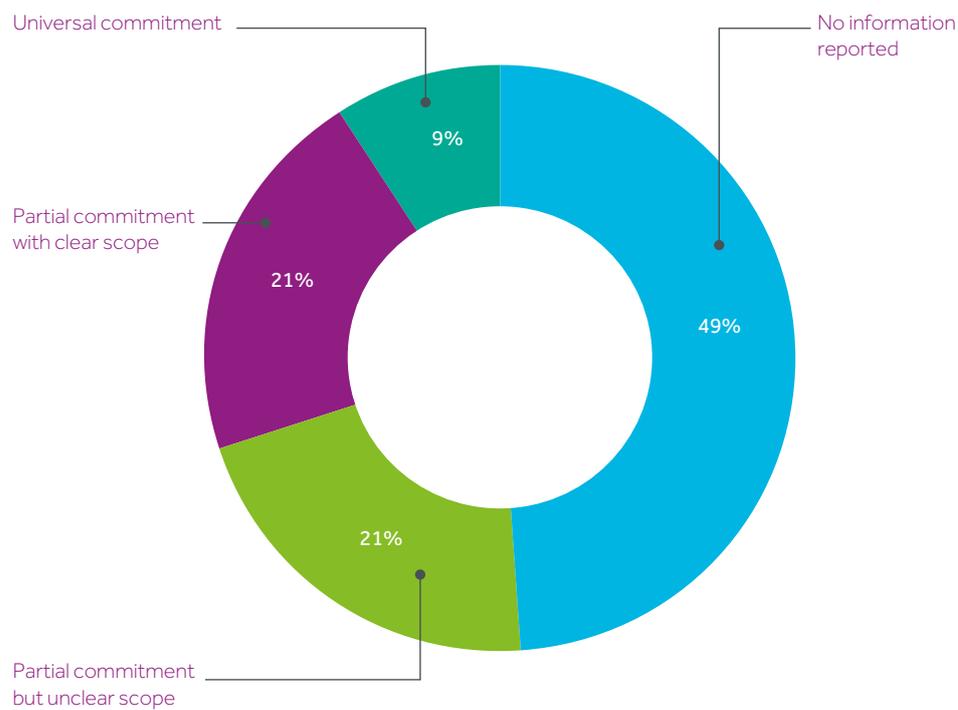


Figure 2.12: Percentage* of companies with commitments to the reduction or avoidance of antibiotics

*Figures rounded to the nearest full percentage point.

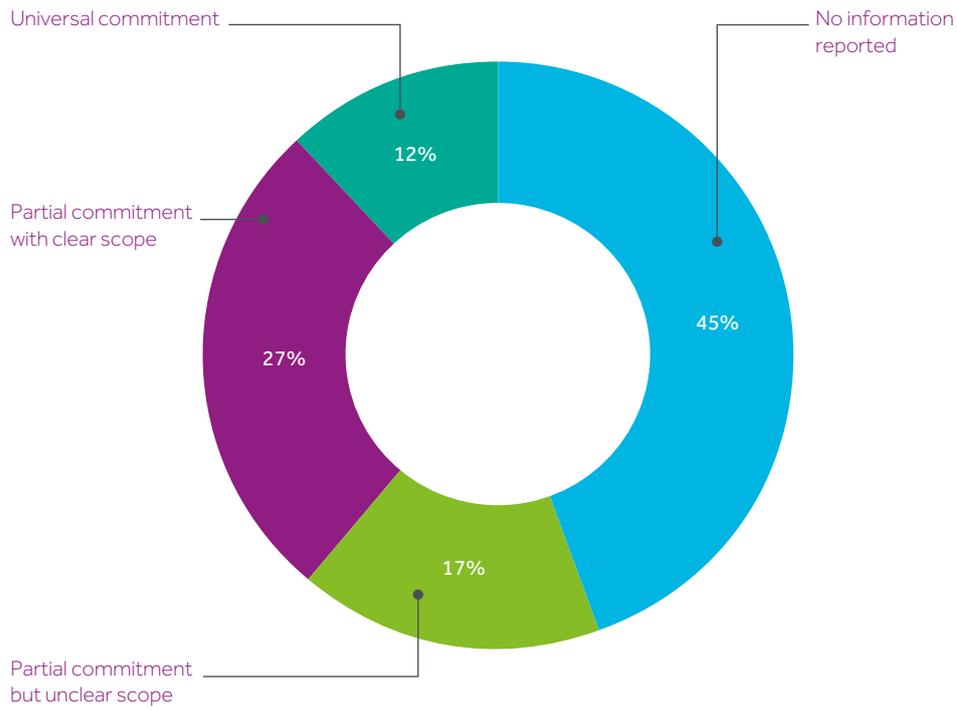


Figure 2.13: Percentage of companies with commitments to the avoidance of routine mutilations

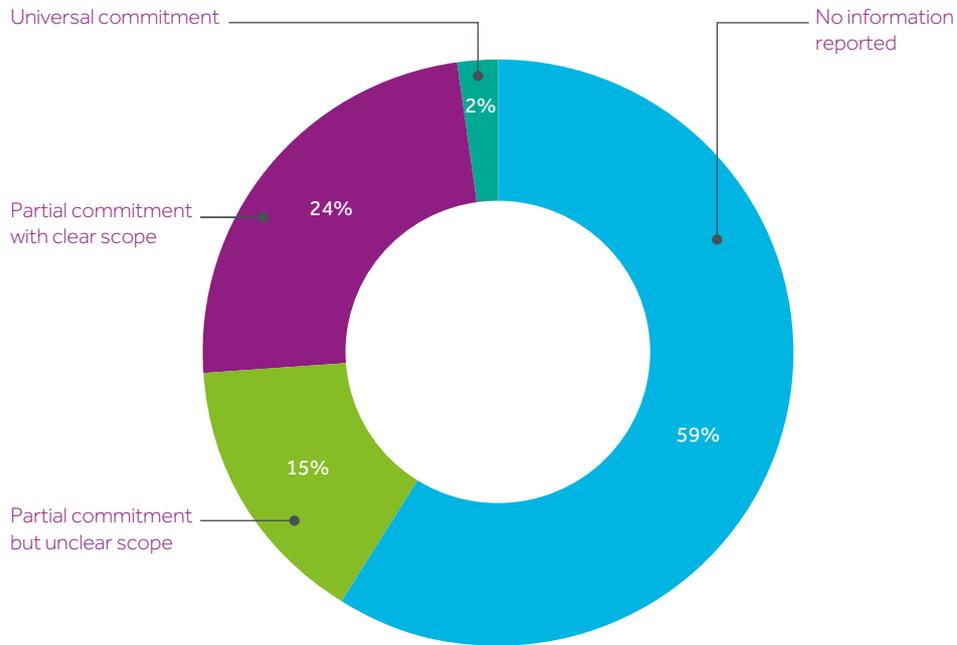


Figure 2.14: Percentage of companies with commitments to pre-slaughter stunning

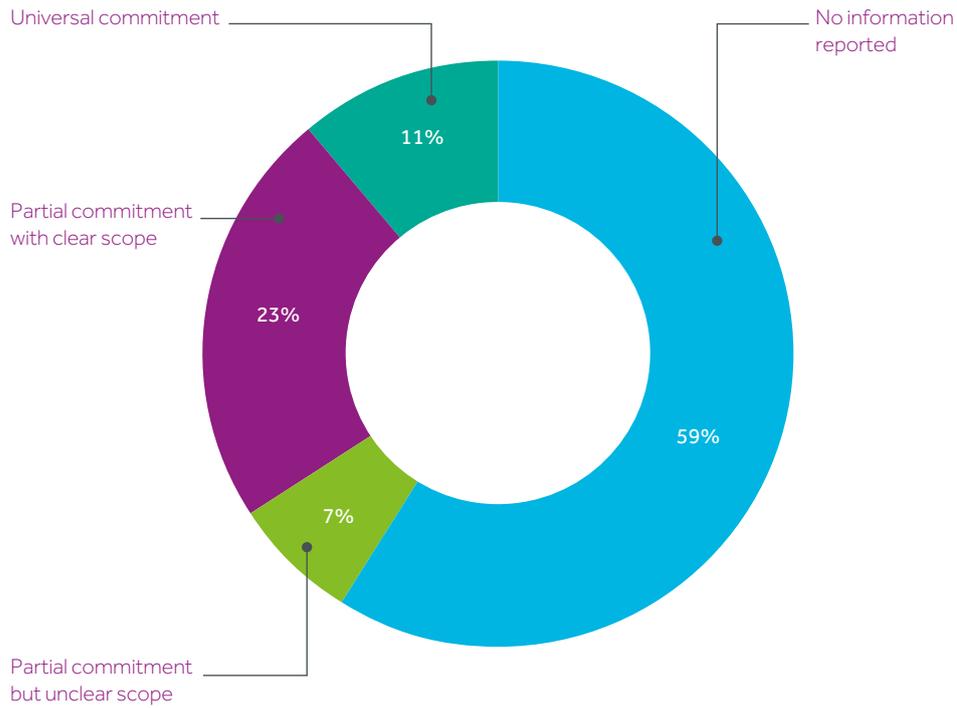
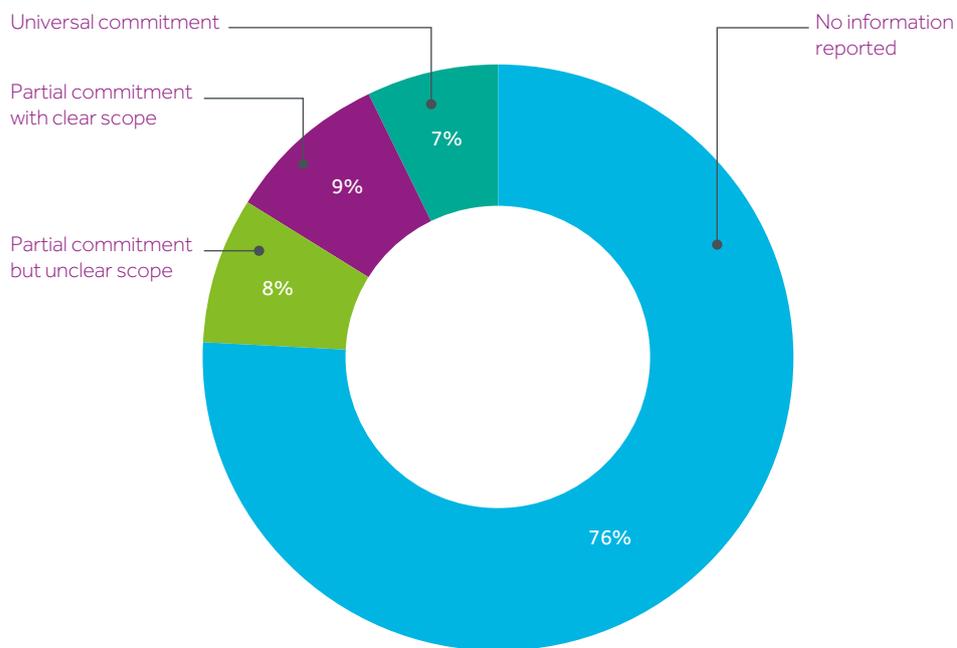


Figure 2.15: Percentage of companies with commitments to the avoidance of long-distance transportation



Box 2.2: Examples of company commitments to the avoidance of routine antibiotics

Mitchells & Butlers places welfare at the core of its antibiotics reduction strategy¹⁰

Mitchells & Butlers recognises that farmers have a responsibility for the health and welfare of the animals on their farm. It sees that farmers have a joint responsibility with their veterinary surgeon to ensure the correct and appropriate use of antimicrobials, including antibiotics, to maintain animal health.

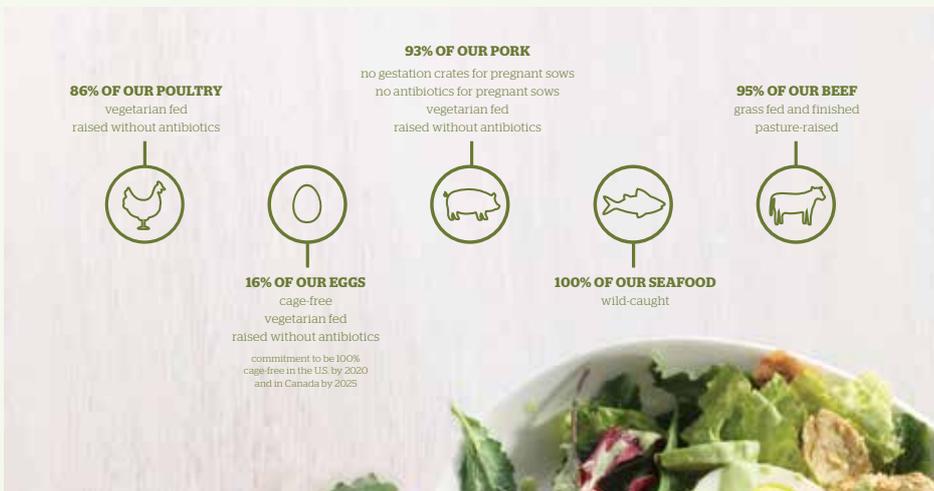
Mitchells & Butlers also recognises that farmers and stock-keepers can play a major role in ensuring the responsible use of antibiotics and other antimicrobials on farms, by following appropriate guidelines, such as those included in most farm assurance schemes and also by following guidelines set out by the Responsible Use of Medicines in Agriculture Alliance (RUMA). In alignment with the principles set out by RUMA, Mitchells & Butlers requires supplying farmers and producers to only administer antibiotics under professional veterinary supervision and guidance.

By encouraging the adoption of enhanced levels of biosecurity and animal husbandry to reduce the risk of disease challenges, Mitchells & Butlers prohibits the routine prophylactic use of antibiotics and works with its suppliers to ensure this practice is removed.

Panera Bread's commitment to avoiding antibiotics extends beyond regulatory requirements¹¹

Panera believes in the humane treatment of livestock and poultry because it is better for animal and human health and because it results in better products for its guests. The company's commitment to animal welfare began in 2004, when it started serving chicken raised without antibiotics. It has since expanded its purchase of proteins raised without antibiotics to turkey and selected pork products, and has worked to eliminate unacceptable forms of confinement, including gestation crates and battery cages. Additionally, the subtherapeutic use of growth hormones, ionophores, beta agonists, arsenic and sulfa drugs, or other medicines intended to promote growth or prevent disease is prohibited.

By the end of 2016, more than 93 percent of Panera's pork supply - and 100 percent of its bacon, breakfast sausage and ham served on sandwiches and salads - was raised without antibiotics and without the use of gestation crates for pregnant sows. Panera noted that the remaining 7 percent was accounted for by salami introduced with the launch of Panera's Italian sandwich in 2016, and that it was exploring how it could ensure that this meat also met its standards.



Noble Foods focuses on addressing the need for antimicrobial intervention^{12, 13}

Egg producer and dessert manufacturer, Noble Foods, recognises the link between irresponsible use of antimicrobial medicine and the increase in antibiotic resistance. The company's focus is on preventing the need for antimicrobial intervention, by improving the overall health status on its supplying farms. As a general principle Noble Foods does not permit the routine prophylactic use of antimicrobials but it does recognise, as indicated in the RUMA guidelines, that controlled intervention may be required on a clinically-assessed risk basis to prevent the outbreak and spread of disease and to safeguard animal welfare. Noble requires its farmers' medicine records to provide an annual record of the amount of antibiotics used, and for each farmers' use of antibiotics to be reviewed annually by a vet.

Box 2.3: Example of a company commitment to the avoidance of routine mutilations**Hormel Foods prohibits routine mutilations of piglets on farms supplying its Applegate products¹⁴**

For over 30 years, Applegate has been producing high quality natural and organic hot dogs, bacon, sausages, deli meats, cheese and frozen products. The products are made without GMO ingredients and the meat is sourced from farms where animals are treated with care and respect and are allowed to grow at their natural rate. These commitments are all part of Applegate's mission – Changing The Meat We Eat®.

Applegate explains that in many systems, piglets have their tails cut because overcrowded conditions lead to pigs gnawing on each other's tails. Applegate ensures that pigs have enough space and the appropriate living environment so that these routine mutilations not necessary. It requires that the flooring in barns is at least 70% solid and has bedding such as hay or straw; these measures ensure that the pigs are more comfortable, and they reduce the risk of injury and keep the pigs occupied by satisfying their natural urge to seek and root.

Applegate works with third-party certifiers to ensure that the animals are raised and handled in ways that are aligned with its mission and that truly honour the Five Freedoms. All of its farms are third-party certified, in addition to being verified by Applegate's trained animal welfare experts.

Governance and management

Reflecting the comments above about the increasing number of companies with comprehensive policy frameworks starting to ensure these commitments are being effectively implemented, we have reached the point where approximately half of the companies (even allowing for the 43 new companies) covered by the Benchmark have integrated farm animal welfare into their management systems and processes. For example:

- 80 out of the 150 companies covered by the 2018 Benchmark report some information on responsibilities, at either or both a senior management and/or an operational level, for farm animal welfare.
- 106 (71%) companies have now set farm animal welfare-related objectives and targets.
- 66 (44%) report that they include farm animal welfare in supplier contracts.
- 86 (57%) describe how they monitor and audit the farm animal welfare performance of their suppliers.
- 53 (35%) report on providing animal welfare training to their employees, and 57 (38%) report on having internal controls for managing non-compliance with their farm animal welfare policies.

It is likely that we will continue to see improved performance in farm animal welfare governance in future years. Our experience has been that, as new companies begin to engage with the BBFAW and its partners on improving their farm animal welfare performance, they start by developing their overarching policies and commitments. They then move onto their governance processes, as they move to ensure that their commitments are effectively implemented.

71%

of global food companies have set farm animal welfare-related objectives and targets

Box 2.4: Examples of company approaches to farm animal welfare governance

Charoen Pokphand Foods (CPF) assigns company-wide management responsibility for animal welfare¹⁵

CPF recognises that good animal welfare, which embraces both the physical and mental health of animals, is an important aspect of overall food quality. The company is committed to elevating animal welfare in business practices and to creating awareness among employees.

CPF assigns responsibility for animal welfare management to the head of each business unit. An internal team is tasked with ensuring effective implementation of the policies and that the company's practices adhere to Thai legislation, EU Directives, customer codes of conduct and international standards on animal welfare. CPF's own comprehensive practice requirements cover issues such as animal husbandry systems, feeding and nutrition, health care and disease prevention, farm hygiene, animal handling and transportation, documentation and employee training.

WH Group establishes ESG Committee¹⁶

Over 15 years ago, WH Group subsidiary, Smithfield, launched its industry-leading sustainability program. In 2010, the company established the role of chief sustainability officer as part of the company's long-term focus on corporate social responsibility and sustainability, and in 2017, it established an Environmental, Social and Governance (ESG) Committee at the Board level. The Committee is responsible for identifying ESG issues that are relevant to and important to the Group, including matters that impact on or are relevant to its shareholders and other key stakeholders. The Committee is responsible for formulating the sustainability goals and plans of the Group, reviewing relevant performance and reporting the results and providing recommendations to the Board.

Company subsidiaries, Shuanghui and Smithfield have established their own sustainability management system as they operate in markets where they are subject to different laws and legal standards. Under the guidance of the ESG Committee, subsidiaries implement measures that are consistent with the local actual conditions and overall sustainability principles of the Group. The two subsidiaries learn from each other through frequent and structured exchanges of information, ideas and experiences.

The Cheesecake Factory outlines its governance of farm animal welfare¹⁷

The Cheesecake Factory's animal welfare policy forms one of the three pillars of its Sustainable Sourcing Policy. In order to ensure the effective implementation of the Sustainable Sourcing Policy, the Cheesecake Factory has designated management responsibility across the organisation, with overall ownership and responsibility residing with the Vice President of Sustainability.

Sustainability, as a department, reports directly to the President of the company on all issues. Additionally, on a monthly basis, the company's Sustainability Committee meets to discuss current sustainability and animal welfare efforts, challenges, and opportunities. This Committee is made up of the CEO, President, Chief Culinary Officer, Senior Vice President of Operations, Senior Vice President of Global Development, Senior Vice President of Purchasing, Senior Vice President of Performance Development, Vice President of Beverage and Bakery, Vice President of Organizational Engagement and Talent, Vice President of Staff Relations, Vice President of Information Technology, Vice President of Quality Assurance, Vice President of Risk Services, Vice President of Sustainability, Vice President of Global Procurement, Vice President of Kitchen Operations, Senior Director of Public Relations, and the Director of Marketing.

This management structure provides accountability at the highest levels in the company, and enables the business to better integrate animal welfare into its routine business procedures.

Compass Group establishes animal welfare steering group¹⁸

To further shape policy and drive performance and reporting across its global business, Compass Group established an Animal Welfare Steering Group in July 2017 and appointed a member of its Group Executive Board as senior sponsor. The Steering Group will report annually on global farm animal welfare performance and the corresponding outcomes.

To oversee management and compliance against farm animal welfare standards across its global supply chain, it has nominated its Group Supply Chain Integrity Manager as its Group Farm Animal Welfare Officer.

Compass Group communicated its enhanced Supplier Code to new suppliers in 2018. It used this process to further raise supplier awareness of its sourcing standards. Agreement with this Code forms part of Compass Group's purchasing terms and conditions for supply.

Box 2.5: Examples of corporate objectives and targets linked to farm animal welfare**Aramark announces global cage-free commitment¹⁹**

Aramark, a global leader in food, facilities management and uniforms, is expanding its commitments to responsible sourcing and animal welfare by extending its 100 percent cage-free egg commitment worldwide by 2025, including for liquid and shell eggs. Operating in 19 countries, Aramark purchases over 300 million eggs annually. In the US, the company's largest market, Aramark has been serving 100 percent cage-free shell eggs since 2015 and is transitioning to 100 percent cage-free liquid eggs by 2020.

Aramark's global cage-free egg commitment builds upon its animal welfare policy, established in 2015, requiring suppliers to establish animal welfare protocols that prevent mistreatment from confinement, painful procedures and rapid growth. All of the company's policies and decisions reflect insights and expertise from its independent Sustainable Sourcing Advisory Panel, comprised of business experts, suppliers, academia and animal welfare organisations.

Aramark recently published an Animal Welfare Progress Report highlighting the company's ongoing advancement of responsible sourcing and animal welfare goals, including:

- Calling on suppliers of broiler chickens to address breed selection, space, enrichments and slaughtering practices by 2024.
- Transitioning 30 percent of its US pork purchases to group-housed in 2017, while working with suppliers, industry and animal welfare organisations to increase supplies to enable it to achieve 100 percent group-housed purchases by 2022.
- Incorporating responsible sourcing policies into supplier contracts that feature recognised, third-party certifications from the Global Animal Partnership (GAP), Certified Humane by Humane Farm Animal Care and others.

Box 2.5: continued Examples of corporate objectives and targets linked to farm animal welfare

SONIC's priorities on farm animal welfare²⁰

SONIC's priorities on farm animal welfare include:

Broiler Chickens:

- SONIC has a goal of only sourcing chicken for SONIC menu items raised in ways that meet standards set by the Global Animal Partnership (GAP) by 2024.
- SONIC plans to only source broiler chickens that have been processed using a multi-step controlled-atmosphere stunning system in the same time frame.

Sow Housing:

- SONIC is actively working to eliminate gestation crates from its pork supply chain and intends to reach that goal no later than 2022, the timeframe several large pork producers have set to be fully transitioned to group sow housing.
- SONIC will continue to favour suppliers that raise hogs in a gestation crate-free environment in addition to suppliers that can provide audit and tracking reports for sourcing crate-free pork.
- As of March 2017, 52 percent of sows raised for SONIC lived in group housing.

Laying Hens:

- SONIC's animal welfare requirement for egg suppliers is to meet United Egg Producer (UEP) standards for housing and other poultry practices
- In January 2016, SONIC made the commitment to source 100 percent cage-free eggs by 2025.

Antibiotic Use:

- Effective January 2017, SONIC's poultry suppliers are required to only administer antimicrobial drugs to animals for the prevention, control and treatment of disease. The use of antibiotics that are medically important to humans, for the sole purpose of growth promotion is strictly prohibited.

Tyson Foods continues to explore new technologies to improve animal welfare in its supply chain²¹

Tyson Foods partners with researchers on potential animal welfare improvements, focusing on areas such as animal mobility and lameness, antibiotics alternatives, and good production management. Over the past 18 months, the company has invested approximately \$170,000 in research initiated by universities, agricultural organisations or companies.

Examples of the new technologies piloted by Tyson Foods in FY2017 include:

- Updated Stunning Methods: Tyson Foods piloted an alternative stunning method, controlled atmosphere stunning (CAS), and is currently applying this technology in its turkey plant and two of its pork plants with plans to expand this to several more plants, including poultry, in FY2018. CAS has the potential to be a more humane harvesting technique by using carbon dioxide, rather than electricity, to render the animal unconscious and insensible to pain in advance of processing.
- Future Housing Systems: Tyson Foods supports its farming partners to learn new and improved ways of raising and managing their hogs. Tyson Foods began piloting additional housing systems for pregnant sows in FY2017, including open pen gestation. When farmers are building or rebuilding housing systems for sows, Tyson Foods urges them to consider open pen gestation. At the end of 2017, 45 percent of the sows from Tyson Foods' contract farms were housed in open pens. The company's target is 58 percent by the end of 2018.
- Lighting Project: Tyson Foods is conducting research to identify lighting systems that chickens prefer, both from a performance and physiological basis. Its initial results suggest that chickens prefer to eat in bright light and then move to dimmer areas for rest, with neurological markers in the birds indicating that a gradient lighting system may provide a more satisfactory environment for the chickens than high-intensity lighting alone.
- Tylosin and Roughage Experiment on Finishing Cattle: In December 2017, Tyson Foods completed a project to better understand the effects of removing tylosin, an antibiotic and bacteriostatic feed additive, from finishing cattle. This project focused on the performance of roughage (fibrous indigestible material in vegetable foodstuffs that aids the passage of food and waste products through the gut) on cattle growth, carcass characteristics, and prevalence of liver abscesses.

Kraft Heinz focuses on production practices, health and broiler welfare²²

Hen housing (Cage-free, enriched colonies and free-range)

Globally, Kraft Heinz is transitioning to using only eggs from hens that live in cage-free environments. Across its North American operations, it is on track to achieve this goal by 2025. In Europe, its supply is 100 percent enriched housing or free-range.

Sow housing

Kraft Heinz is working with its pork suppliers to transition from traditional gestation stall housing to pregnant sow housing alternatives. Its goal is to source all pork globally from suppliers who can provide pregnant sow housing that safely allows for greater movement for the animals while ensuring their comfort. Since 2017, Kraft Heinz has been giving preference to suppliers that are able to help it achieve its goal of being 100% sow stall free.

Tail docking in dairy

Kraft Heinz supports industry initiatives which will eliminate cow tail docking in its milk supply chain. The majority of its milk and milk products come from the US and Canada. In the US, the company requires its suppliers and their farmers to follow the National Dairy FARM Animal Care guideline, which will phase-out routine tail docking starting January 2017. Similarly, it requires its suppliers in Canada to follow the Code of Practice of the Care and Handling of Dairy Cattle, which also phases-out routine tail docking in 2017. Third-party audits are conducted to ensure these guidelines are followed and to monitor progress. For the small volume of milk products coming from other parts of the world, Kraft Heinz will work with its supplier partners to end this practice.

Broiler Welfare

Kraft Heinz is committed to improving the welfare of broiler chickens and is working to transition its supply to meet even higher welfare standards. It has committed to working with its suppliers and the industry to achieve the following goals by 2024:

- To source 100 percent of its chicken via breeds approved by the Royal Society for the Prevention of Cruelty to Animals (RSPCA) or by the Global Animal Partnership (GAP) for measurably improved welfare and quality of life
- To provide birds with more space to perform natural behaviours, including a stocking density no greater than 6 pounds per square foot
- To provide birds with better, enriched environments including litter, lighting and other enrichments that align with GAP's environmental standards
- To implement a multi-step controlled-atmosphere processing system that avoids live-shackling
- To demonstrate compliance with these commitments via supplier verification or third-party auditing, and to communicate its progress as part of its regular sustainability reporting.

Advancing farm animal welfare in the food industry

Research and development and industry partnerships are critical building blocks for progress on farm animal welfare. Research – by companies themselves or, more commonly, by academic institutions supported by or in conjunction with companies – is being conducted into the full range of issues covered in this report. Many companies – 46 of the 150 companies (31%) – talk about this research as part of their reporting on farm animal welfare. For example:

- Plukon Food Group is currently working with Katholieke Universiteit (KU) Leuven to improve animal welfare during transportation of broilers.
- REWE Group is investing in projects including projects focused on alternative husbandry practices to reduce tail biting in pigs, stopping beak trimming in laying hens, finding alternatives to the slaughter of day-old chicks and breeding programmes for organic turkeys.
- Noble Foods has worked on a study on welfare indicators for free-range hens with FAI and Bristol University.

Alongside investment in research and development, companies need the internal capacity and governance processes to take advantage of these insights in their own operations. Equally, there is a need for the right conditions – for example, the right policy frameworks, incentives, knowledge and understanding across the industry - to ensure that research outputs and better practice more generally are adopted across the industry. This cannot be achieved by companies on their own but requires them to work with their supply chain partners as well as other companies, industry bodies, policy makers and civil society to create the conditions for change.

Collaborating with others is a feature of the food industry. Companies regularly work with their trade associations and with other groups to raise the profile of specific issues that are of concern to the industry, to build understanding inside the food industry and externally, and to influence public policy and legislation. We are starting to see this happening on farm animal welfare. Fifty-nine (39%) of the 150 companies covered by this year's benchmark report that they work with others to advance farm animal welfare (a number of examples are presented below). While it is difficult to draw definitive conclusions based on the information reported by companies, it appears that most of the collaborative work is focused on the technical aspects of farm animal welfare, on sharing knowledge and expertise on specific issues, and on developing standards on key farm animal welfare issues (e.g. handling procedures). These are important contributions, but they are only part of the picture. Companies provide limited if any information on how they, for example, engage with policymakers to encourage higher standards of farm animal welfare or how they are working with others to promote consumer understanding of farm animal welfare.

Box 2.6: Examples of company initiatives aimed at advancing farm animal welfare in the industry

Coop Switzerland is involved in multiple projects to improve farm animal welfare²³

A selection of these projects is included here:

Rearing dual-purpose chickens

Coop Switzerland launched a field trial at some of its organic farms to test whether a new breed of chicken could be used to produce dual-purpose chickens. The aim was to help address the problem of around 2 million male chicks from laying hen rearing programmes being killed each year because they are not suitable for fattening and they do not lay eggs. The female chickens are used for egg production while the males are used for fattening. The results of the field tests were positive, and dual-purpose chickens are now being reared for Coop on around 10 organic farms.

Fewer antibiotics in calf rearing

In Switzerland, many calves leave the farm where they were born at the age of around four to five weeks to be reared on a specialised veal farm. This is also the case for many Naturafarm calves. However, the health of the calves is often impaired when they arrive at the veal farm. This may be because the care they receive at the farm where they are born is not always the best, or it may be because the young animals often come into contact with germs from other farms during transport. In both cases, the animals may require treatment with antibiotics. Coop Switzerland is involved in a project to improve the conditions on the birth farms and during transport of the calves, with the aim of enhancing animal well-being and reducing the use of antibiotics. If the project is successful Coop Switzerland plans to integrate the measures into the Naturafarm guidelines.

Barilla Group works with expert advisors and industry partners to eliminate tail docking of pigs²⁴

Barilla Group embarked on a joint process involving Compassion in World Farming and Barilla's suppliers in Italy aimed at eliminating the practice of docking the tails of pigs along the supply chain. This process is designed to improve animal welfare, raise awareness of the issue among farmers, and promote the development of alternative farming practices that reduce the incidence of cannibalism and aggression among animals. After an initial phase of monitoring and improvement of environmental standards on all pig farms, Barilla involved farmers in specific training sessions on best practices in long-tailed pig farming.

In parallel, between late 2016 and early 2017, the Group carried out tests and assessments on the best materials for enhancing the farm environment, with a view to meeting the behavioural needs of animals to best effect and prevent cases of aggression. Barilla is actively collaborating with its suppliers to implement these livestock farming standards across its entire supply chain by 2019.

Hilton Food Group's supplier engagement²⁵

Hilton Food Group works with supply chain partners to understand where further improvements can be made on animal welfare. This includes:

- Facilitating the provision of fish welfare training by European experts to fish farmers in Turkey and Vietnam.
- Sharing the findings from an audit of a salmon slaughter plant in South Norway, which revealed an opportunity to improve the flow of salmon into the entrance of the electrical stunner to ensure a head first alignment and thus a more effective stun. In Norway, the actions agreed from a salmon slaughter audit resulted in the improved segregation of lumpfish (which help clean sea lice from salmon) during live grading, to ensure both species are stunned correctly.
- Working collaboratively with Tesco and other leading protein producers as members of Tesco Producer Groups to assist in developing their welfare and environmental farming standards.
- Participating in the UK Antimicrobial Resistance industry working group, which is looking at the livestock industry's use of antibiotics for the treatment and prevention of disease and the actions that can be taken to reduce usage and contribute towards a reduction in the growth in human antibiotic resistance.
- Contributing to the development and improvement of global welfare standards, for example providing expert fish welfare input into the development of the fish welfare standards within Global G.A.P. and other standards.
- Working with its farmed salmon suppliers in Norway to support improvements in sea lice prevention.
- Investing in the exploration of farming technology innovations including closed containment systems and offshore salmon farming.

Co-op Food (UK) and Noble Foods form partnership to drive up welfare standards²⁶

The Co-op and Noble Foods are working in partnership to identify and promote the highest levels of animal husbandry and farm practice. This has included the development of clear sourcing standards outlining Co-op's high expectations with regards to food safety and quality, sustainability and the environment, and farm animal welfare.

Co-op is working jointly and in conjunction with the newly formed Co-op Producer Group and the Food Animal Initiative on a number of research and development projects related to current industry challenges. The research is focusing on (a) the incidence and causes of keel bone damage in laying flocks, and (b) collating and analysing data to measure key welfare outcomes and understand levels of antibiotic use across the Co-op supply base. With the impending changes to the Freedom Food standards on aerial perching, the information will be used to improve welfare by informing producers on best practice in relation to the layout of perches in laying units as well as helping to shape the Co-op's strategy to address the wider industry challenge of antimicrobial resistance.

The Cheesecake Factory works with its suppliers and animal welfare experts to develop farm animal welfare implementation tools for suppliers²⁷

The Cheesecake Factory partners with its suppliers and animal welfare experts, such as World Animal Protection, to implement specific standards, goals, and guidance related to the advancement of animal welfare through its supply chain. Each of its Supplier Implementation Guides is species-specific and builds from leading resources such as Certified Humane by Humane Farm Animal Care, Global Animal Partnership, as well as best practices from industry groups such as the National Dairy Farm Program. These requirements and resources are further developed and reviewed through a consultation process with World Animal Protection.

Consumer engagement

Sixty-five (43%) of the 150 companies assessed in the 2018 Benchmark provide information to their customers or consumers on farm animal welfare, with 29 companies presenting multiple examples of their engagement with their customers, suggesting that farm animal welfare is an important part of their customer messaging and engagement.

The proactive communication of farm animal welfare issues provides a variety of positive spill over effects: it raises consumer awareness, it directs consumers to higher welfare choices, and it establishes consumer expectations that farm animal welfare should be an integral part of companies' approaches to corporate sustainability.

Box 2.7: Examples of companies communicating farm animal welfare to their customers

- **Wesfarmers** produces multiple communications aimed at promoting higher farm animal welfare to customers or consumers. These include magazine articles on higher welfare pig production and television adverts for growth promotant-free and sow-stall-free pork.²⁸
- **Tyson Foods** hosted a Facebook Live video session in June 2017, which included a Tyson Foods animal well-being specialist, a Tyson Foods veterinarian and a poultry farmer who offered viewers an opportunity to see first-hand how chickens are raised. The topics discussed included housing conditions, animal nutrition, and humane handling and welfare.²⁹
- **Tönnies'** Animal protection at slaughter webpage shows videos of pig and cattle slaughter, that are instructive and transparent about the slaughter process and about the actions it takes to safeguard animal welfare. A dialogue page allows consumers to ask questions on animal welfare that are answered in detail.³⁰
- **Walmart's Asda** produces a sustainable farming booklet for customers, which includes information on relevant species and related welfare topics.³¹
- **Lidl Netherlands** communicates on a high welfare egg system, Kipster, that also raises the cockerels for burgers. Meanwhile, Lidl Germany communicates on housing systems (including higher welfare housing systems) via its meat labelling compass ("Haltungskompass").³²

Der Lidl-Haltungskompass






Wir kennzeichnen
unser Fleisch transparent

Das 4-Stufen-Modell vermittelt auf einen Blick,
nach welchen Kriterien das Tier gehalten wurde.

lidl.de/haltungskompass



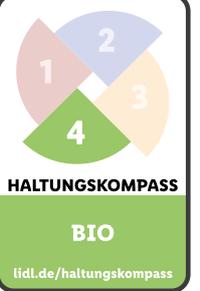
lidl.de/haltungskompass



lidl.de/haltungskompass



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lidl.de/haltungskompass

3. In focus

Farm animal welfare performance



Farm animal welfare performance

The results of the 2018 Benchmark suggest that companies are paying increasing attention to performance monitoring and reporting. While performance reporting and impact remains the lowest scoring section of the Benchmark, we are encouraged to see an improvement in both the proportion of companies that report at least some performance data and the average score.

In total, 93 of the 150 companies (62%) now report at least some performance data, compared to 59% in 2017. If we were to remove the new companies added to the 2018 Benchmark, the like-for-like increase is considerably higher (72%), reflecting the low proportion of new companies (37%) reporting any performance data.

When we first established the Benchmark, we were clear that the Benchmark needed to focus on farm animal welfare performance, i.e. on the impacts of companies and their supply chains on the welfare of animals farmed for food. Given the immaturity of animal welfare reporting by food companies, we deferred the introduction of performance questions until 2014, to allow companies to focus on reporting on their governance of farm animal welfare; that is, how their policies, management systems and processes were being implemented to ensure the welfare of the animals in their care. Nine performance impact questions were introduced in the 2016 Benchmark, and the scoring for these questions was incorporated into companies' overall scoring and Tier rankings for the first time in 2017.

Performance disclosure

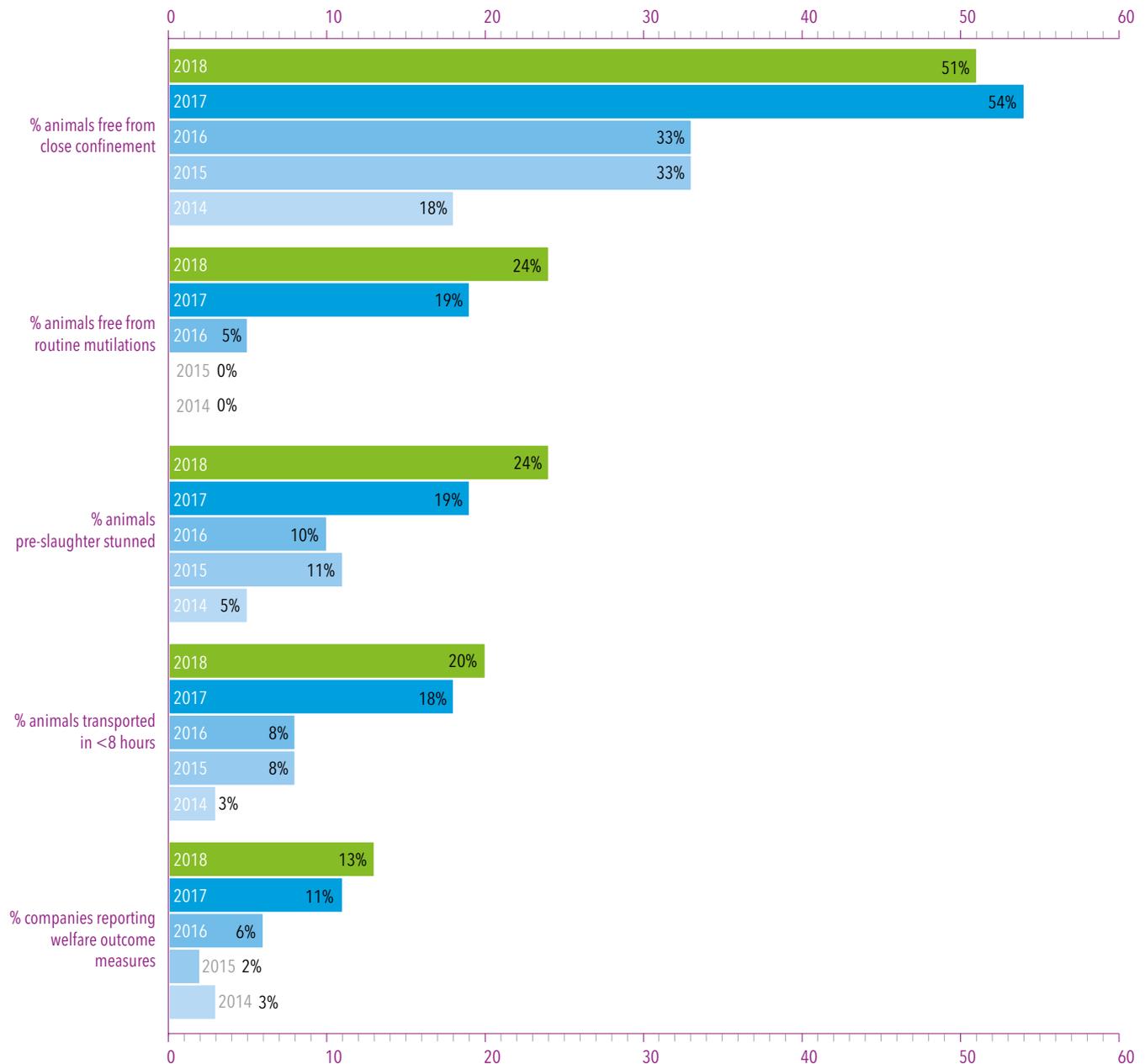
We assess whether companies – see Box 3.1 – disclose information about their performance in four specific areas - the avoidance of close confinement, the avoidance of routine mutilations, pre-slaughter stunning and long-distance live transportation – as well as whether they report on other welfare outcome measures (WOMs). We award higher points for those companies who report this information for all species, for all geographies and for all products. We also ask whether companies provide an explanation of progress and trends in performance (either in terms of input measures or welfare outcome measures), with higher points awarded to companies that report across all relevant species and geographies, and that provide an explanation of the factors that affected their performance.

Box 3.1: Performance disclosure questions

- Does the company report on the proportion of animals in its global supply chain that are free from confinement?
- Does the company report on the proportion of animals in its global supply chain that are free from routine mutilations (e.g. castration, teeth clipping, tail docking, toe clipping, dehorning, de-snooding, de-winging, disbudding, mulesing, beak trimming, fin clipping)?
- Does the company report on the proportion of animals in its global supply chain that are subject to pre-slaughter stunning?
- Does the company report on the average, typical or maximum permitted live transport times for the animals in its global supply chain?
- Does the company report on welfare outcome measures (i.e. measures linked to the physical, emotional and/or behavioural wellbeing of animals)?

The results of the 2018 Benchmark demonstrate that companies are increasingly reporting on farm animal welfare performance (see Figure 3.1).

Figure 3.1: Performance reporting by companies 2014-2018



Note: All performance reporting questions were introduced in 2014, with the exception of the question on performance relating to routine mutilations which was introduced in 2016.

Reflecting the emphasis placed on the issue by NGOs and by the media, it is unsurprising that reporting on close confinement is the most advanced; 76 out of the 150 companies (51%) covered by the 2018 Benchmark provide some information on the proportion of animals that are free from close confinement. This – despite the addition of 43 companies to the 2018 Benchmark – is broadly similar to the proportion for 2017 and significantly higher than the 33% in 2016 and the 18% in 2014, when this question was first asked.

Reporting on other aspects of performance remains relatively limited. Just one fifth of the companies covered by the Benchmark provide information on the proportion of animals that are free from routine mutilations, the proportion of animals that are stunned prior to slaughter or on transport times. It is, however, relevant to note that the proportion of companies providing information in these areas is slowly increasing.

Only 19 companies (13%) report on farm animal welfare outcomes. For example, companies have provided data on measures such as lameness rates in pigs, beef cattle and sheep; leg cull rates in broiler chickens; somatic cell count in dairy cattle; feather wear in laying hens; and sea lice infection rates and antibiotic usage levels in farmed fish. This is a relatively new area for most companies, although our discussions with companies suggest that they collect a wide variety of data on animal health, on the physical condition of animals and on animal welfare outcomes, and certainly much wider than the data that they put in the public domain.

The data above also point to the critical role played by the Benchmark in driving disclosure. Companies have told us that they prioritise reporting on the specific data points or indicators requested by the Benchmark, partly to improve their score and partly because these are seen as standard disclosure expectations that are likely to be expected by and used by other stakeholders. We will, therefore, continue to evolve the Benchmark to capture additional species-specific welfare indicators or outcome measures. We will also, at least for the foreseeable future, continue to ask this general question about welfare outcome measures. The reason is that welfare outcome reporting remains in its infancy and it is important that we continue to track company thinking on the measurement of farm animal welfare outcomes, and that we encourage innovation and thinking in this area.

As a final reflection on performance reporting, we note that the data being reported by companies has two almost universal characteristics. The first is that this information tends to be very limited in scope (e.g. data is often reported for single countries or for single product lines). The second is that most companies do not specify the proportion of the animals in their supply chains achieving specific welfare outcomes, nor do they provide sufficient information to enable a reasonable estimate to be made.

Performance impact

Over the past two years we have progressively increased the emphasis placed on performance impact in the Benchmark. In line with the BBFAW objective to drive up standards on animal welfare in the industry, we want to understand the effectiveness of company management of farm animal welfare in terms of the direct impact of their policies, systems and processes on the animals within their operations and supply chains. We introduced nine performance impact questions in the 2016 Benchmark (see Box 3.2), and the scoring for these questions was incorporated into companies' overall scoring and tier rankings for the first time in 2017. For each question, the number of points awarded reflected companies' actual performance; an example is presented in Box 3.3³³.

Box 3.2: Performance impact questions

- What proportion of laying hens (for shell eggs and fresh/frozen products and ingredients) in the company's global supply chain is cage-free?
- What proportion of fresh/frozen pork products and ingredients in the company's global supply chain is sourced from pigs that are free from sow stalls/gestation crates?
- What proportion of fresh/frozen milk or milk products and ingredients in the company's global supply chain is sourced from cows that are free from tethering?
- What proportion of broiler chickens for own-brand fresh/frozen products and ingredients in the company's global supply chain is reared at lower stocking densities (specifically, 30 kg/m² or less)?
- What proportion of laying hens in the company's global supply chain is free from beak trimming or tipping?
- What proportion of pigs in the company's global supply chain is free from tail docking?
- What proportion of dairy cows in the company's global supply chain is free from tail docking?
- What proportion of animals (excluding fin fish) in the company's global supply chain is pre-slaughter stunned?
- What proportion of animals (excluding fin fish) in the company's global supply chain is transported within specified maximum journey times?

Box 3.3: Assessing company performance on cage-free eggs

BBFAW Question: What proportion of laying hens (for shell eggs and fresh/frozen products and ingredients) in the company's global supply chain is cage-free?	
	No. of points (max 10)
0% of laying hens are cage-free, or no reported information	0
1 – 25% of laying hens are cage-free	1
26 – 50% of laying hens are cage-free	3
51 – 75% of laying hens are cage-free	5
76 – 99% of laying hens are cage-free	7
100% of laying hens are cage-free	10

Just over half (55%) of the companies covered by the Benchmark score points on the nine performance impact questions although in most instances the scoring relates to just one or two questions. Expressed another way, most companies are simply not providing any information on their performance on most of these issues.

This also reflects the fact that companies that do report information are not providing the information in a way that enables the proportion of animals impacted to be determined; for example, companies may report data for a particular country or a particular product line, but not explain what proportion of total sales or volumes are represented by that country or product line.

However, for three of the questions, a slightly higher proportion of companies is reporting. Notable findings include:

- Sixty-three companies (42%) report on the proportion of laying hens in their global supply chains that is free from close confinement (cage-free). Of these, nine state that 100% of the laying hens in their supply chains are free from close confinement.
- Thirty-nine (26%) report on the proportion of pigs in their global supply chains that is free from sow stalls/gestation crates, although just three companies indicate that 100% of the pigs in their supply chains are free from sow stalls/gestation crates. It is worth noting that a number of companies have committed to being sow stall free by 2022, at least in their North American operations. We therefore expect these proportions to increase over the coming years.
- Seventeen companies (11%) report on the proportion of broiler chickens in their global supply chains that is reared at lower stocking densities (30 kg/m² or less). Of these, only four have at least half of the broiler chickens in their supply chains kept at or below this stocking density.

9

companies report that 100% of eggs in their global supply chains are from cage-free hens

Our discussions with companies point to several reasons – although the relative importance differs between companies - why the proportion of companies reporting on farm animal performance remains relatively low and limited in scope:

- Many companies are still focusing on strengthening their internal management systems and processes, and on working internally and with their suppliers to gather the data they need to report on performance.
- Companies are withholding the publication of data until they are confident about the quality and reliability of the data reported internally and through their supply chains.
- Reporting on performance is largely seen as being for internal rather than external audiences.
- Companies are reluctant to report partial data, as this can highlight apparent gaps in their management and reporting on certain issues.
- Companies are concerned that performance data will be misconstrued by audiences that lack the technical or industry knowledge to effectively understand what acceptable or good practice looks like.
- Companies generally have multiple animal species and production systems, they operate in multiple jurisdictions and under multiple regulatory requirements and manage individual species to a variety of standards. These factors mean that reporting on overall performance is complex and it is difficult to provide an overall quantitative picture of performance.
- There is a lack of consensus on the performance data that need to be reported. It is interesting to note that some companies have pointed to the performance questions in the BBFAW as providing the basis for a common, standardised framework for reporting on farm animal welfare performance. They have also noted that there is a need for a critical mass of companies to report this information, thereby enabling the creation of a level playing field across the food industry.

In Box 3.4, we present eight examples of company reporting on performance and impact. We have highlighted these examples as they illustrate different ways that companies can report data, and how these data might be linked back to corporate policies and objectives and targets on farm animal welfare.



Box 3.4: Examples of company reporting on performance and impact

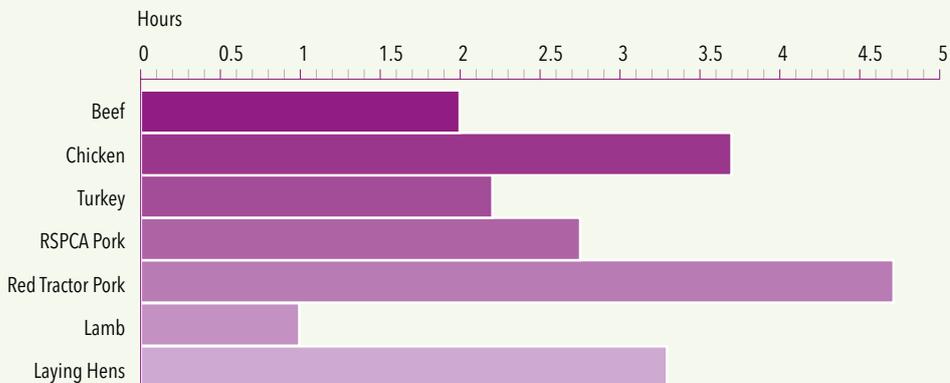
Co-op Food UK³⁴

Co-op Food UK reports on a range of welfare outcome measures. For example, it provides species-by-species reporting on routine mutilations:

- 100% of farmed fish are free from fin clipping.
- 100% of laying hens within its shell egg supply chain are not beak trimmed.
- 17.8% of pigs are free from tail docking (fresh/frozen). (However derogation is given to producers from the RSPCA, that they can tail dock if advised by vet to prevent an animal welfare issue arising.)
- 28.1% of pigs are free from teeth clipping (fresh/frozen).
- 96.57% of dairy cows are free from tail docking. (Scope: Own brand chilled and frozen milk products and ingredients, covering: milk, cream, cheese, fats, cakes, yoghurts, desserts, ice cream, hot and continental desserts, and other dairy products).
- 100% of pigs in its fresh/frozen supply of pork are free from castration.
- 100% of turkeys are free from de-snooding.
- 100% of lambs are free from mulesing.

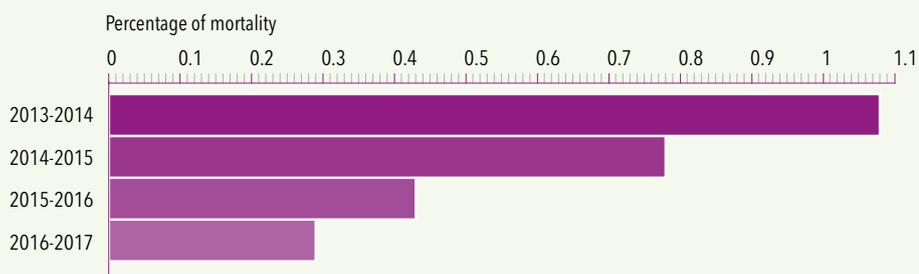
The company also reports on species specific performance indicators. For example:

Average journey time to abattoir (hrs) June 2016 -May 2017

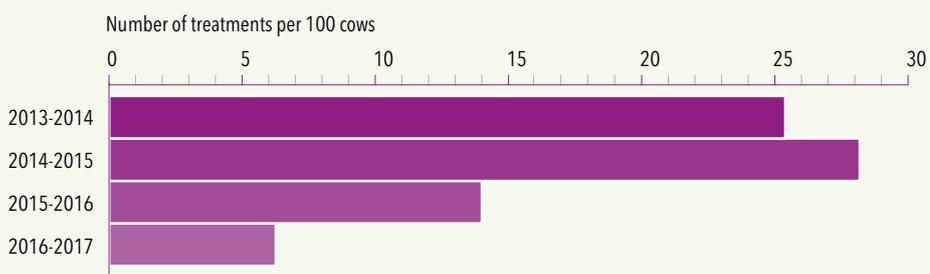


- This is measuring the average journey time to abattoir 2016-2017.
- Dairy maximum journey time to abattoir is 8 hours.
- Scottish Atlantic Salmon maximum journey time to abattoir is 48 hours.

Mortality for fattening stock



Dairy mastitis rate



BRF³⁵

In its Annual and Sustainability Report 2016, BRF provides detailed reporting on its animal welfare programmes and welfare outcomes. This includes data relating to the percentage and total number of animals reared and/or processed, by species and breed type and by housing type.

Percentage and total number of animals reared and/or processed, by species and breed type and by housing type						
Type*	Turkeys		Broilers		Pigs	
	2015	2016	2015	2016	2015	2016
Negative pressure	23.07%	36.54%	38%	34%	-	-
Positive pressure	76.93%	66.51%	48%	41%	-	-
Dark house	-	-	14%	25%	-	-
Collective management	-	-	-	-	15.50%	20.10%
Individual management	-	-	-	-	84.50%	79.90%

* Negative pressure: Aviaries with yellow or blue curtains, with or without cooling equipment in the air intake and with nebulizers, or aviaries with black/silver curtains without cooling and with nebulizers. In this system, greater control of temperature and humidity is possible, offering the poultry a better comfort condition throughout life. Positive pressure: Aviaries working with open curtains using the maximum of the natural condition of the environment. In the first days of the lot, equipment is used to warm the facilities, providing thermal comfort to chicks. At high temperatures, they use fans and nebulizers to assist in ambient conditions. They provide an environment closer to the animals' usual environment. Dark house: Aviaries with black / silver curtains, cooling equipment, and nebulizers. They work with curtains closed. The air enters through one end and is forced out through the opposite end. In this system, lighting is supplied and controlled by the producer in order to guarantee the best condition for the animal in the different stages of production. Provides better control over the temperature and ventilation of the facility, ensuring the poultry thermal comfort. Collective gestation: during the gestation period, the pigs remain in collective bays (in group) with freedom of movement and to express their natural characteristics. Individual gestation: during the gestation period, the pigs remain in individual bays. Despite limiting the space of the pigs, this practice facilitates the individual control of the gestating pigs and provides conditions to avoid fights among the animals.

Whitbread³⁶

Whitbread recognises the move towards the use of outcomes derived from animal-based indicators to assess net welfare in both farm and slaughter situations for the principal farmed livestock species. Historically Whitbread has relied predominantly on self-reporting by suppliers to ensure compliance with its welfare requirements. However, KPI assessment is now a stand-alone element of the independent inspections that are ongoing across the Whitbread supply chains. As of June 2018, this monitoring process allows performance capture and provides an overview of emerging health and welfare trends.

Animal welfare key performance indicators							
Primal Form	Beef	Laying Hen Eggs	Broiler Chicken	Pork	Lamb	Turkey	Milk
Farm Assured product (Red Tractor in UK or equivalent)	95%	100%	65%	90%	100%	100%	100%
Whitbread welfare audits carried out	95% completed	100% completed	45% completed	0%	0%	100% completed	0%
Number of welfare audits conducted	30	1	5	0	0	3	0
Number of Non-Compliances identified.	56	4	31	0	0	10	0
Number of Non-Compliances managed & closed post audit	100%	100%	100%	0%	0%	100%	0%
On-boarded to Whitbread's due diligence system	100% completed	100% completed	100% completed	100% completed	100% completed	100% completed	100% completed
Animal welfare policy questionnaire completed	70%	100%	100%	50%	100%	50%	0%

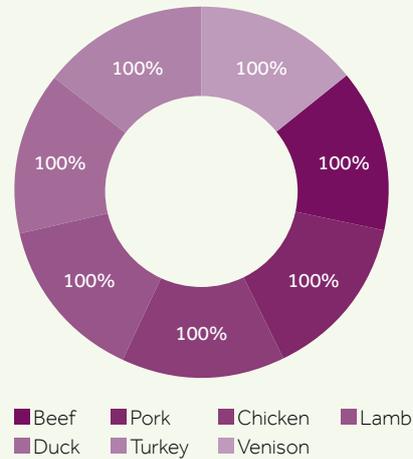
J Sainsbury³⁷

In its Animal Health and Welfare Report, J Sainsbury describes its approach to animal welfare and its animal welfare outcomes for each of the major species it sells. It reports on two overarching welfare outcome measures, namely pre-slaughter stunning and long-distance transport, and on the proportion of animals reared to basic and higher welfare standards.

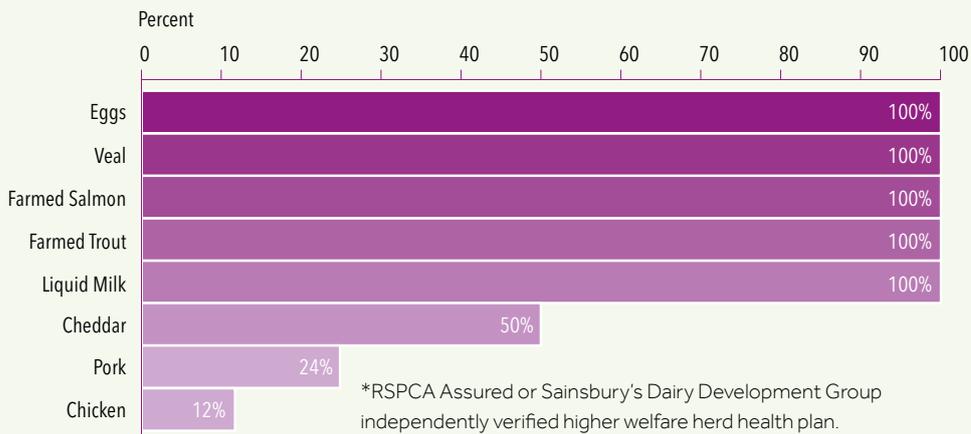
Own brand animals stunned prior to slaughter



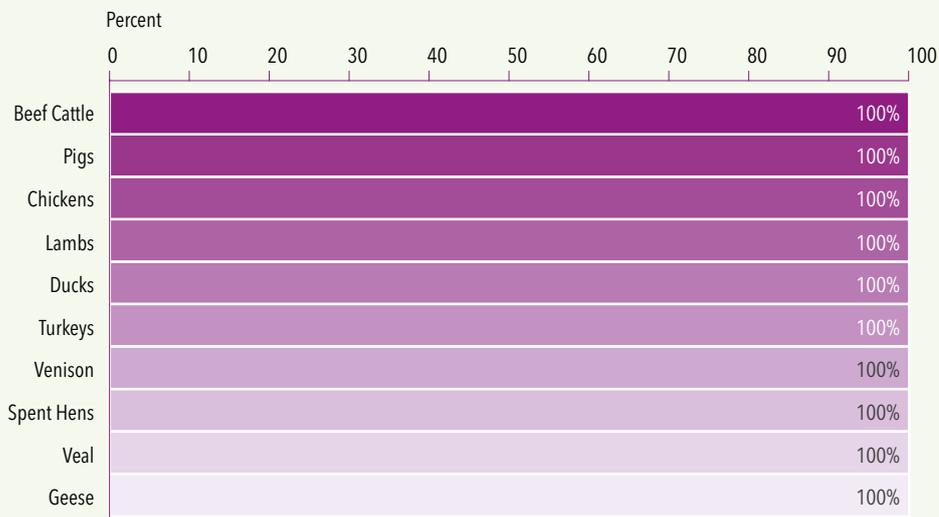
Proportion of own brand animals reared to Red Tractor standards (or in-country equivalent)



Proportion of own brand animals reared to higher welfare standards*



Own brand animals transported within the specified limit of 8 hours prior to slaughter



The Cheesecake Factory³⁸

The Cheesecake Factory reports on its goals, its performance and its future outlook on a species-by-species basis for each of dairy cows, pigs, beef cattle, laying hens, broiler chickens and veal calves. For example, in relation to pigs it reports the following information:

Status	Goal	Our performance	Future outlook
In-progress	Sourcing antibiotic-free dairy, defined as no-antibiotics ever (NAE). We will not support a supplier withholding appropriate veterinary care from a sick or injured animal, but once treated with antibiotics, these animals may not enter our supply chain.	<ul style="list-style-type: none"> • Our suppliers for pork have committed to reduce and eliminate the use of antibiotics medically important to human health. • At present approximately 3%-5% of our pigs are no antibiotics ever (NAE) by volume. 	<p>The majority of the food service and restaurant industry antibiotic goals are focused on eliminating antibiotics medically important to human use. The group of companies committed to NAE is significantly smaller. As such, we face challenges as our collective purchasing power is not yet large enough to sway larger producers and suppliers to pursue NAE if they are not already doing so. To address this, we are actively partnering with our producers and suppliers to build a phased approach around their commitments to phase out medically important antibiotics and actively establish a pathway to NAE production in alignment with our goals.</p>
In-progress	Phasing out physical alterations as a preventive measure, including for dairy cows: tail docking, dehorning, disbudding, and ear notching. When physical alterations are undertaken, pain management must be administered and/or best practices implemented.	<ul style="list-style-type: none"> • Approximately 25% of our supply is raised without the use of teeth clipping/grinding or ear notching, and is castrated before ten days of age. • While most of our suppliers still currently tail dock their pigs, it is commonly performed before five days of age, with several suppliers also experimenting with providing pain relief during the procedure. • Additionally, several pork suppliers have implemented pilot projects to test nonsurgical castration of boars, and we are working with them to monitor the results. 	<p>We are working in tandem with our suppliers and animal welfare partners to better understand current and emerging best practices, particularly around approved types of pain relief and proactive management strategies to help reduce/eliminate the need for physical alterations.</p>
In-progress	Ensuring all pigs are housed in a group pen setting from birth as appropriate and are provided environmental enrichments.	<p>At present the majority of our suppliers house pigs in group housing, with approximately 10% - 15% also provided with environmental enrichments, such as balls, chains, and toys.</p>	<ul style="list-style-type: none"> • Additional work is being conducted to better understand the use of farrowing crates and/or pens by suppliers, and also to expand the use of environmental enrichments that have proven effective and engaging for the animals. • The challenges and uncertainty with the current trade climate is making a number of producers reluctant to invest in new infrastructure or improved housing, making changes to farrowing and gestation crates/stalls, or certain environmental enrichments more difficult.

Status	Goal	Our performance	Future outlook
In-progress	Ensuring all pigs are housed in a group pen setting from birth as appropriate and are provided environmental enrichments (contd)	<ul style="list-style-type: none"> At present approximately 18% of our supply is raised in gestation crates/stalls for less than 28 days, with another 5%-7% raised without the use of gestation crates/stalls at all. Overall the majority of our suppliers keep sows in gestation crates/stalls for less than 45 days. 	<ul style="list-style-type: none"> We are continuing to work with our suppliers to phase out gestation crates/stalls where they are still in use, and are also working to learn more from our suppliers who have been able to successfully transition to no use (zero days) of gestation crates/stalls. A challenge we continue to encounter is that there is not a commonly applied definition of gestation crate free in the industry or amongst our peers. While we believe gestation crate free to be zero days, some producers and peer companies define 30-60 days of sow confinement as "gestation crate free" or have switched to "group sow housing" with an undefined number of days of gestation crate use. Since this was not our intent, we are building from the currently recommended average of less than 28 days and are continuing to work with our suppliers towards zero days. We are continuing to encourage on-farm video monitoring of sow farms, and expect about 20%-30% coverage by the end of 2018.
In-progress	Sourcing pigs free from added growth hormones and growth promoters.	At present approximately 6% of our pigs by volume meet this standard.	We are continuing to work with our suppliers to better understand strategies and challenges to sourcing product free from growth hormones and promoters, particularly betaagonists like ractopamine.
In-progress	Ensuring our pigs come from suppliers who utilize a wholesome, quality, and holistic feed with no animal by-products.	We are continuing to work with our suppliers to ensure high quality and holistic feed, and are working to verify the specific feed types provided.	
In-progress	Ensuring that during transport, pigs are handled by trained staff using low stress handling techniques and that there is adequate space and thermal comfort for animals. Any sick, or injured animals, or animals that may have difficulty withstanding transport may not be transported without veterinary treatment.	<ul style="list-style-type: none"> We understand live animal transport creates stress for the animals, and so ask our suppliers to implement training and programs (Pork Quality Assurance (PQA +), Transport Quality Assurance (TQA), Pork Avenue, etc...) as well as strategies and practices to lower the stress level and improve comfort for animals being transported to processing facilities. 	<ul style="list-style-type: none"> We are continuing to partner with our suppliers to gain visibility into the transportation process. Specifically, we are working to understand transport times to processing facilities, so as to better monitor and minimize pre-slaughter transport times, in line with expert animal welfare guidance.
In-progress	Ensuring humane practices, such as controlled atmosphere stunning (CAS) or controlled atmosphere killing (CAK), are utilized prior to harvest, and support tools such as live video monitoring to ensure humane processing.	<ul style="list-style-type: none"> Animals harvested by our suppliers and vendors are required to be rendered unconscious prior to slaughter in order for them to be insensible to pain and distress until death. At present we estimate that 5%-10% of our current supply by volume comes from CAS facilities. 	We are continuing to encourage our suppliers to utilize and invest in controlled atmosphere stunning (CAS), and are encouraging the continued adoption and use of third-party remote video monitoring for both sow farms and processing facilities.

Marks and Spencer³⁹

Marks and Spencer reports on a series of overarching farm animal welfare performance measures.

Global supply chain measures (fresh & ingredient including frozen)	2015/16	2016/17	2017 ¹
Percent (%) animals in M&S supply chain free from routine mutilations ²	-	-	48
Percent (%) animals in M&S supply chain free from confinement	-	-	99.8
Percent (%) of pigs in M&S supply chain (fresh, ingredient and continental including frozen) free from tail docking	-	-	42
Percent (%) of M&S pork supply (fresh, ingredient and continental including frozen) from sows that are non-confinement farrowed	-	-	76
Percent (%) of laying hens in M&S supply chain (fresh and ingredient) free from beak trimming	-	-	5.5
Percent (%) animals (excluding fin fish) in M&S supply chain transported within specified maximum journey times (i.e. 8 hours or less)	100	100	100
Percent (%) animals (including fin fish) in M&S supply chain pre-stunned prior to slaughter	100	100	100

¹Covers the 2017 calendar year period, i.e. January to December. Previous years data reported on a financial year basis, i.e. April to March.

²Excludes animal numbers from the calculation for beef, lamb and venison as this data is currently unavailable.

In addition to these overarching farm animal welfare measures, Marks and Spencer has developed and started to report on a number of key species-specific animal health and welfare measures for beef and lamb, pork, poultry, dairy, eggs, and fish and shellfish. For example, the measures it reports for beef and lamb are presented below.

Measures	All supply - Beef (Fresh & Ingredient including frozen)			All supply - Rose veal (Fresh & Ingredient including frozen)		
	2015/16	2016/17	2017 ¹	2015/16	2016/17	2017 ¹
Number of animals	-	-	264,457	-	-	4,920
Maximum transport time (hrs) to factory across all animals (including loading and unloading)	8	8	7.3	1.5	1.5	3.5
Average transport time (hrs) to factory across all animals (including loading and unloading)	2.6	2.7	3.1	0.8	0.8	2
Proportion (%) of finisher herds pre-stunned prior to slaughter	100	100	100	100	100	100
Outcome measures²						2017¹
Disease	Lung Conditions (Pneumonia, Pleurisy) (%) (mean group score ± SE)					2.98 ± 0.076

¹Covers the 2017 calendar year period, i.e. January to December. Previous years data reported on a financial year basis, i.e. April to March

²Source information: number of groups outcome measures relate to: 2,229 and number of animals outcome measures relate to (based on animal delivered to the factory): 298,425

Measures	UK supply - Lamb (Fresh & Ingredient including frozen)			NZ supply - Lamb (Fresh & Ingredient including frozen)		
	2015/16	2016/17	2017 ¹	2015/16	2016/17	2017 ¹
Number of animals	-	-	487,575	-	-	5,391,363
Maximum transport time (hrs) to factory across all animals (including loading and unloading)	8	8	8	8	8	8
Average transport time (hrs) to factory across all animals (including loading and unloading)	2.6	2.6	3.8	3.7	3.7	3.5
Proportion (%) of finisher herds pre-stunned prior to slaughter	100	100	100	100	100	100
Outcome measures²						2017¹
Disease	Lung Conditions (Pneumonia, Pleurisy) (%) (mean group score \pm SE)					0.3 \pm 0.019

¹Covers the 2017 calendar year period, i.e. January to December. Previous years data reported on a financial year basis, i.e. April to March.

²Source information: number of groups outcome measures relate to: 383 and number of animals outcome measures relate to (based on animal delivered to the factory): 416,153

Cranswick⁴⁰

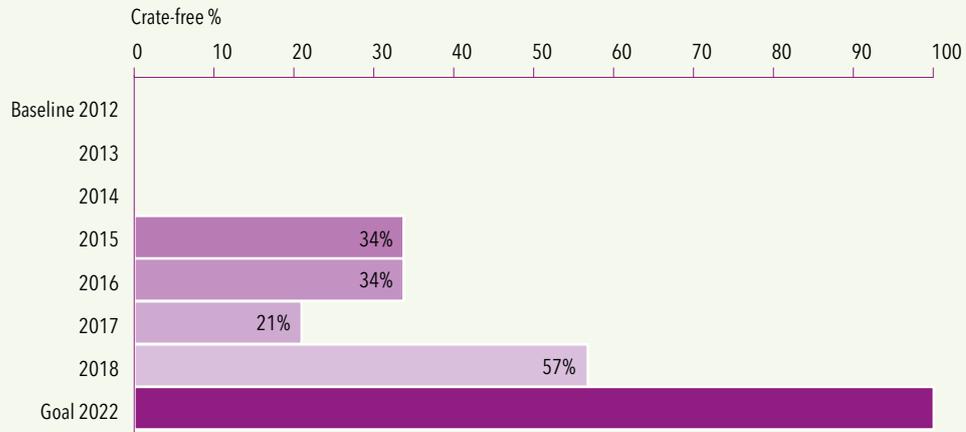
Cranswick has a series of animal welfare-related KPIs and reports annually on its performance against these.

KPI	Target Date	2014	2015	2016	2017
All animals to be stunned before process	2012	100%	100%	100%	100%
All eggs to be sourced from free range farms	2012	100%	100%	100%	100%
Typical transport times to our own processing sites - below 8 hours	2012	100%	100%	100%	100%
All dairy cows to be free from tethering	2020	N/A	N/A	95%	95%

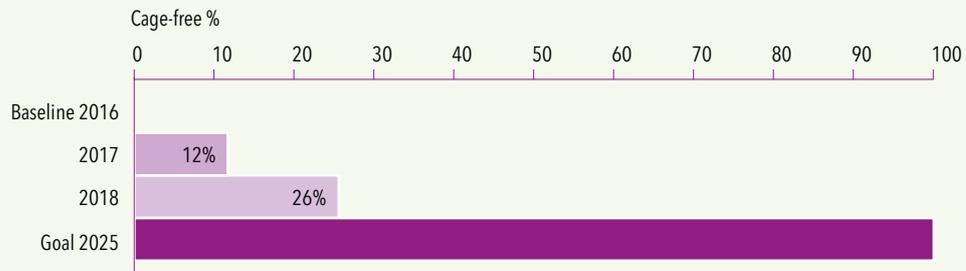
Campbell Soup Company⁴¹

Campbell Soup Company reports annually on its performance against its commitments to crate free pork and cage-free eggs.

Crate-free pork progress



Cage-free eggs progress



4. Accelerating impact



Accelerating impact

In this section, we describe how BBFAW will address the challenges and issues identified in this report, and how we intend to encourage the changes – in policies, in management systems, in reporting, in performance – that we think are needed to respond to these challenges. Before we do this, we will start by reflecting on and describing the factors that drive company action on farm animal welfare, and on the role played by investors in driving these changes.

The current state of play

The results of the 2018 Benchmark demonstrate how much progress has been made by companies in establishing the policies, systems and processes needed to effectively manage farm animal welfare. Despite the tightening of scoring requirements, we have 17 companies that are considered to have integrated farm animal welfare into their business strategies, and 19 companies that have moved up at least one Tier in the Benchmark. The innovation and transparency demonstrated by these companies has been hugely helpful in influencing other companies to report their performance data and improve their management practices and processes and has been one of the key drivers of the longer-term changes we are now seeing. Of the 55 companies who have been covered by the Benchmark since 2012, 17 (31%) have moved up one Tier, 20 (36%) have moved up two Tiers and eight (15%) have moved up three Tiers. These results have occurred despite the tightening of criteria and the increased emphasis on performance reporting and impact.

However, the data also highlight the scale of the challenge. Seventy companies are in Tiers 5 and 6 and provide little or no information on their approach to farm animal welfare, and 12 companies saw their year-on-year scores fall. While the fact that some companies saw their scores decrease is partly attributable to the increased emphasis on farm animal welfare performance outcomes and impacts, it also suggests that there is more to do both in terms of encouraging improvements in policies, management systems and processes, and in ensuring that improvements are institutionalised and maintained over time.

In line with the long-term goals of the Benchmark, we are progressively increasing the emphasis on performance reporting and performance impact. We are already starting to see improvements in the quantity of information being reported, albeit from a low base. We recognise, however, that the quantity of the information being provided by most companies remains limited, and that the quality of that information – in terms of consistency, comparability and coverage – is still not fit for purpose. The consequence is that it is often not possible to get an accurate picture of company performance on animal welfare or to understand how a company is performing in terms of specific species or on particular welfare issues. In turn, this makes it very difficult to assess the quality of a company's management systems or to answer questions such as whether they are implementing their policies, whether they are delivering on their objectives and targets, whether they are managing the business risks and opportunities presented by farm animal welfare, or whether they are improving the welfare of the animals in their supply chain. It is also not possible to make meaningful performance comparisons between companies, and to understand which companies are leading on animal welfare performance outcomes.

These are not just issues for companies but also for investors. Investors want to know that food companies are effectively managing the business risks and opportunities presented by farm animal welfare. Investors want to know that company management systems are effective and capable of delivering the performance and business outcomes that are being sought. Investors want to be able to compare companies and to be able to differentiate between them on the basis of their performance and impact.

70
global food companies
appear in Tiers 5 and 6

The company and investor perspective

Company engagement is central to the Benchmark process. Each year, we engage directly with companies on their scores in the Benchmark (typically 40-50% of the companies assessed each year comment on their draft assessments, with 43% commenting in 2018), on proposed changes to the Benchmark and on the role being played by the Benchmark in driving change in their farm animal welfare policies, practices, processes and performance. We meet with companies, individually and collectively, to discuss farm animal welfare in the wider context of their efforts on corporate responsibility and sustainability, and increasingly to discuss the strategic implications, risks and opportunities of farm animal welfare for the business as a whole.

We have a similar level of engagement with investors. We have worked closely with investors since 2011⁴² to ensure that the Benchmark and associated tools are relevant to investors, and to catalyse change in the investment community on the issue of farm animal welfare.

Over the past three years, these discussions have consistently pointed to four key drivers of change (although their relative importance differs between investors):

- The recognition of farm animal welfare as a business risk that needs to be managed in a similar manner to other business risks. This has led to companies integrating farm animal welfare into the management infrastructure (e.g. auditing processes, training programmes, monitoring and reporting mechanisms) that they have developed for other social and environmental issues.
- The recognition of farm animal welfare as a strategic opportunity, both in terms of the potential for new product offerings and market access and in terms of the potential for brand differentiation and reputation enhancement.
- Customer and client demand, which is creating pressure both to raise standards within core product offerings, and to innovate and invest in new, higher welfare products.
- Investor action on farm animal welfare, which has raised the profile of farm animal welfare and created pressure on companies to manage the business risks and opportunities presented by farm animal welfare (see Box 4.1).

Box 4.1: Understanding investor influence on farm animal welfare

When we first established the BBFAW, farm animal welfare was seen as a relatively niche investment issue, primarily of concern to those investors with a strong view on the ethics of raising animals for food. That picture has changed dramatically, with an increasing number of investors now taking account of farm animal welfare-related risks and opportunities in their investment processes, and with investors regularly engaging with companies on their approach to farm animal welfare.

As just one example, some 21 investors with £2.3 trillion in assets under management participate in the BBFAW-convened Global Investor Collaboration on Farm Animal Welfare⁴³. This is the first-ever international collaborative investor initiative aimed at encouraging major global food companies to strengthen their management systems and processes on farm animal welfare. The Collaboration involves the participating investors writing to the companies covered by the Benchmark, commending leading and improving companies on their performance, and encouraging poorer performers to improve. These letters also explain that investors see farm animal welfare as a business risk that needs to be managed effectively and as a potential future source of business opportunity and growth. The participating investors follow up these letters by raising farm animal welfare-related issues with companies as part of their wider engagement with these companies. In 2018, 45 of the 110 companies formally responded to the investor letters. Many of them indicated that, as a result, they would be strengthening their reporting on farm animal welfare and will be looking to proactively engage with investors on this issue. We expect to see these efforts leading to substantial improvements in many of these companies' scores in future iterations of the Benchmark.

Companies and investors agree that the Business Benchmark on Farm Animal Welfare has been a key driver for change. The main ways in which BBFAW has driven change have been:

- It provides companies with guidance and clear expectations on how to structure their management processes and reporting.
- It helps companies to understand the expectations and interests of key stakeholders (e.g. clients, customers, investors).
- It enables companies to benchmark themselves against their industry peers. This helps senior management understand the company's overall performance and can support the internal case for action and for investment.
- It enables comparisons to be made between internal business units and product lines, enabling strengths and weaknesses to be identified.
- It is used by investors to assess the business risks and opportunities of farm animal welfare for individual companies, to provide insights into companies' quality of management, to assess the suitability of companies for inclusion in screened (ethical) funds, and to identify potential investment opportunities in the food sector.
- It is used by investors in their company engagement, both to prioritise companies for engagement (e.g. to identify leaders and laggards) and to define their expectations of companies (e.g. expectations that companies will achieve a specific Tier ranking within a particular period of time).
- It is now seen as the most authoritative global benchmark for the assessment of corporate farm animal welfare practice. Companies use their performance in the Benchmark as tangible evidence of their commitment to farm animal welfare; in fact, 28 of the 150 companies covered by the 2018 Benchmark have reported on their performance in the Benchmark in their corporate communications (e.g. on their websites, in their annual reports and sustainability reports, in media releases).

Box 4.2: Different perspectives on farm animal welfare⁴⁴

In 2018, we surveyed companies and investors on their approach to farm animal welfare. While both companies and investors acknowledged the importance of farm animal welfare (as a business issue and as an investment issue respectively), there were also some notable differences between them.

1. Supplier engagement is a current priority for food companies, although investors continue to focus on policy commitments

Companies were asked to identify their top three priorities on farm animal welfare. The most common answers were 'working with suppliers', 'improving measurement/reporting and welfare indicators', 'confinement and cage-free systems' and 'Antibiotics use'. These are all areas where work appears to be intensifying, with a particular focus on suppliers.

Interestingly, investors seem to have a different focus. When asked about the topics they discuss with food companies, the most common answer was specific policies/positions on key animal welfare issues (75% of respondents), followed by corporate policies on farm animal welfare (58%) and farm animal welfare management systems and processes (50%). This suggests that investors are currently focusing on company policies and positions on animal welfare and, albeit to a lesser extent, on the management systems and processes that companies have in place to ensure that these policies are effectively implemented.

2. Customer interest is driving company approaches to farm animal welfare, while investors view farm animal welfare as primarily an investment risk

Customer interest remains the primary driver for food companies to focus on farm animal welfare with 85% of companies citing this, followed by farm animal welfare as a business risk (73%), the Business Benchmark on Farm Animal Welfare (73%) and farm animal welfare as a business opportunity (69%).

The main drivers for investors to pay attention to farm animal welfare in their investment practices and processes were farm animal welfare as an investment risk (73%), farm animal welfare as an investment opportunity (53%) and client demand (47%). Interestingly, several of the investor respondents stated that they also perceive strong ethical reasons for prioritising animal welfare, and that the rationale for minimising animal suffering and/or improving animal welfare is driven not only by financial considerations.

3. Lack of knowledge and customer willingness to pay remain the key barriers to food companies adopting higher standards of farm animal welfare, and affects the level of investor interest in the issue

The main barrier to food companies adopting higher standards of farm animal welfare is lack of customer/client willingness to pay for higher farm animal welfare. Eighty-two percent of company survey respondents identified customer willingness to pay as a barrier to adopting higher standards of farm animal welfare. Despite the finding that customer concern is the main driving force behind company approaches to farm animal welfare, this interest still does not seem to be translating into a willingness to pay more for responsibly produced items. Other important barriers to progress reported by companies were competing management priorities, lack of interest from suppliers or business partners to commit to/invest in higher welfare standards and the absence or lack of awareness of a compelling business case (e.g. the potential impact on brand, sales, consumer trust) for adopting higher welfare standards. These were each identified by approximately one-third of respondents.

For investors, the three most commonly identified barriers to them paying more attention to animal welfare were competing engagement priorities (53% of investor respondents), lack of knowledge/understanding of farm animal welfare (53%) and lack of clarity on the investment case for focusing on animal welfare (47%).

Among other barriers identified by investors were limited responsiveness/action from companies on farm animal welfare, animal welfare not being a major client priority, the weaknesses in the investment/business case (i.e. on the relationship between farm animal welfare and financial performance) and the lack of data on consumer demand and willingness to pay.

How do we accelerate impact?

We see the annual Benchmark, and the associated investor and company engagement, as a long-term change programme. We are hugely encouraged by the contribution the Benchmark has made to defining core expectations for companies, to building investor and company consensus around these expectations and to catalysing change within companies and in the investment community. We also recognise that there is much more to be done, both to institutionalise farm animal welfare in the investment industry and to continue to drive standards of practice and performance in food companies. Our priorities for 2018-2020 reflect these imperatives. We will focus our efforts in the following areas:

1. We will strengthen the signals being sent by investors to food companies about the importance of farm animal welfare as a business issue. We will do this through:
 - Increasing the number of investor signatories to the Global Investor Statement on Farm Animal Welfare.
 - Increasing the number of investors that participate in the Global Investor Collaboration on Farm Animal Welfare.
 - Encouraging investors to proactively raise the issue of farm animal welfare with the food companies in which they are invested.
2. We will raise investor awareness of the investment risks and opportunities associated with farm animal welfare. We will focus particular attention on the investment community in North and Latin America and Asia.
3. We will continue to encourage companies to improve their practices and reporting on farm animal welfare, with a particular emphasis on improving their reporting on farm animal welfare impacts. We will encourage investors and other stakeholders to support these efforts in their engagement with companies.
4. We will build relationships with other stakeholders – in particular, intergovernmental agencies and standards bodies – to integrate BBFAW's criteria into their lending and standards criteria.
5. We will explore the potential to develop country and market-specific benchmarks.

- 6. We will carefully monitor reporting on animal welfare performance and consult with companies and other stakeholders on the appropriateness of increasing the emphasis we place through our scoring on animal welfare performance.
- 7. We will strengthen our focus on themes and issues that food companies and investors see as important. As part of our annual survey of companies and investors, we asked them for their view on which animal welfare topics should be prioritised in the coming years. A variety of issues were identified in this survey (see Table 4.1) although the specific issues that were identified and their relative importance differed between the survey respondents.

Table 4.1: Emerging and increasing farm animal welfare themes for companies and investors

Antibiotics (including locating animal welfare at the centre of company strategies to reduce antimicrobial and antibiotic use)
Links between animal welfare and human and public health, including food safety and pandemics
Clean food (i.e. food containing no additives and no antibiotics)
Use of anaesthesia in routine surgical interventions (e.g. mutilations such as dehorning of cattle and castration of pigs)
The treatment of animals during key interventions (e.g. transition from cages to barns, cow/calf separation, transportation, slaughter)
Effectiveness of slaughter
Fish welfare
Broiler welfare
Housing conditions and close confinement (e.g. gestation crates, battery cages, cage-free and stocking density, free farrowing for sows, bedding and outdoor runs/pastures, outdoor-reared animals, free range chicken production)
Environmental and behavioural enrichment (particularly for broiler chickens and pigs)
Consumer attitudes on animal welfare and on animal-derived protein more generally
Transparency across the supply chain and down to farm level, including measures that can be adopted to enhance transparency (e.g. animal welfare labelling)
Alternative proteins (e.g. cultured meat, plant-based protein)
Environmental impacts of food production (e.g. climate change, deforestation, land use, water usage)
Breed selection/genetics, genetic engineering
Male chick culling
Business costs (e.g. raw materials, energy) and how these affect the business models of different food producers

Appendices



Appendix 1

2018 Benchmark questions and scoring

Management Commitment and Policy

Q1. Does the company acknowledge farm animal welfare as a business issue?

Acknowledging farm animal welfare as a business issue is an important first step towards implementing a comprehensive approach to farm animal welfare management. It is good practice for food companies to identify whether and why farm animal welfare is a relevant issue for the business.

No evidence that farm animal welfare is regarded as a relevant business issue.	0
Farm animal welfare is identified as a relevant business issue.	10
(Max Score 10)	

Q2. Does the company publish an overarching corporate farm animal welfare policy (or equivalent)?

It is good practice for companies to formalise their approach to animal welfare in a policy (or equivalent document such as a statement of guiding principles, a code of practice or a sourcing charter). While the existence of a policy may not provide a guarantee of implementation, the absence of a policy is a clear sign that farm animal welfare is not on the business agenda.

No evidence of a formal policy statement (or equivalent) on farm animal welfare.	0
Broad commitment to farm animal welfare in a policy statement (or equivalent) but no description of how the policy is to be implemented.	5
Broad commitment to farm animal welfare within a policy statement (or equivalent) and a description of the processes in place to ensure that the policy is effectively implemented.	10
(Max Score 10)	

Q3. Does the policy statement provide a clear explanation of scope?

Understanding the scope of a policy is important to understand the breadth of a company's commitment to action on farm animal welfare.

Scope not specified	0
Geographic scope not specified	0
Scope is limited to certain specified geographies	2
Scope is universal across all geographies	5
Species covered not specified	0
Scope is limited to certain specified species	2
Scope is universal across all relevant species	5
Products covered not specified	0
Scope is limited to own-brand products or ingredients (i.e. the policy does not apply to imported or other brand products)	2
Scope is universal across own brand, imported and other brand products	5
(Max Score 15)	

Q4. Does the company have a clear position on the avoidance of close confinement and intensive systems for livestock (e.g. sow stalls, concentrated animal feeding operations (CAFOs), feedlots, farrowing crates, single penning, battery cages, tethering, veal crates, force feeding and, for finfish, high stocking densities and close confinement of solitary finfish species)?

Many of the most significant farm animal welfare concerns result from close confinement practices (such as those listed above) or from high stocking densities in the case of finfish. It is good practice for companies to commit to no close confinement of farm animals and to avoid excessively high stocking densities.

No stated position.	0
The company makes a partial commitment to the avoidance of confinement but the scope (in terms of geography, species, products) is not clearly defined.	1
The company makes a partial commitment to the avoidance of confinement and the scope of the commitment (in terms of geography, species and products) is clearly defined.	3
Universal commitment to avoid confinement across all relevant species, own-brand and other brand products and geographies	5
(Max Score 5)	

Q5. Does the company have a clear position on the avoidance of products from farm animals subject to genetic engineering or cloning and/or their progeny or descendants throughout its products?

Both cloning and genetic engineering raise serious animal welfare concerns⁴⁵. In farmed fish species this includes heat treatment of eggs to induce triploidy, which renders fish sterile.

No stated position.	0
The company makes a partial commitment to the avoidance of animals subject to genetic engineering or cloning but the scope (in terms of geography, species or products) is not clearly defined.	1
The company makes a partial commitment to the avoidance of animals subject to genetic engineering or cloning and the scope (in terms of geography, species and products) is clearly defined.	3
Universal commitment to avoidance of animals subject to genetic engineering or cloning across all relevant species, own-brand and other brand products and geographies.	5
(Max Score 5)	

Q6. Does the company have a clear position on the avoidance of growth promoting substances?

Antibiotics given at low doses improve food conversion rates, most likely by changing the composition of gut microbiota in a way that enables animals to grow faster using less feed. Hormonal growth promoters are used to specifically promote abnormal muscle growth or milk production in animals farmed for food. The use of growth promoting substances can undermine animal welfare, as they may enable animals to grow or produce milk in a way that puts excessive strain on their physiological capabilities. While the use of hormonal growth promoters and the use of antibiotics for growth promotion are banned in the EU, their use is widely practised outside of Europe.

No stated position.	0
The company makes a partial commitment to the avoidance of growth promoting substances, but the scope (in terms of geography, species or products) is not clearly defined.	1
The company makes a partial commitment to the avoidance of growth promoting substances, but the scope (in terms of geography, species and products) is clearly defined.	3
Universal commitment to the avoidance of growth promoting substances.	5
(Max Score 5)	

Q7. Does the company have a clear position on the reduction or avoidance of antibiotics for prophylactic use?

The over-use of antibiotics in humans and in animals is directly linked to the increase in antibiotic resistance. The use of antibiotics on-farm (typically through feed or water) is frequently prophylactic; effectively 'propping up' intensive farming systems where animals are kept in confined and stressful conditions and where their immune systems are compromised and disease outbreaks can spread rapidly⁴⁶. Companies are expected to commit to reducing the levels of antibiotics they administer routinely and to develop animal production systems that are not reliant on the routine use of antibiotics for disease prevention.

No stated position.	0
The company makes a partial commitment to the reduction or avoidance of the routine use of antibiotics, but the scope (in terms of geography, species or products) is not clearly defined.	1
The company makes a partial commitment to the reduction or avoidance of the routine use of antibiotics, and the scope (in terms of geography, species and products) is clearly defined.	3
Universal commitment to the reduction or avoidance of the routine use of antibiotics across all geographies, species and products.	5
(Max Score 5)	

Q8. Does the company have a clear position on the avoidance of routine mutilations (castration, teeth clipping, tail docking, toe clipping, dehorning, desnooding, de-winging, disbudding, mulesing, beak trimming, fin clipping)?

Many farm animals are subjected to procedures that alter their bodies, often with no anaesthesia, causing pain and distress. Examples include beak trimming, castration of beef cattle with knives, branding with hot irons, dehorning of dairy cattle with hot irons, castration and tail docking of pigs, and fin clipping in finfish aquaculture.

No stated position.	0
The company makes a partial commitment to the avoidance of routine mutilations but the scope (in terms of geography, species or products) is not clearly defined.	1
The company makes a partial commitment to the avoidance of routine mutilations and the scope (in terms of geography, species and products) is clearly defined.	3
Universal commitment to avoidance of routine mutilations across all relevant species, own-brand and other branded products and geographies.	5
(Max Score 5)	

Q9. Does the company have a clear position on the avoidance of meat from animals that have not been subjected to pre-slaughter stunning, or (in the case of finfish) meat from animals that have not been rendered insensible?

It is essential to render an animal unconscious before it is slaughtered in order for it to be insensible to pain, discomfort and stress, until death occurs.

No stated position.	0
The company makes a partial commitment to avoid the use of meat from animals that have not been subjected to pre-slaughter stunning or from finfish that have not been rendered insensible but the scope (in terms of geography, species or products) is not clearly defined.	1
The company makes a partial commitment to avoid the use of meat from animals that have not been subjected to pre-slaughter stunning or from finfish that have not been rendered insensible and the scope (in terms of geography, species and products) is clearly defined.	3
Universal commitment to avoid the use of meat from animals that have not been subjected to pre-slaughter stunning or from finfish that have not been rendered insensible across all species, own-brand and other branded products and geographies.	5
(Max Score 5)	

Q10. Does the company have a clear position on the avoidance of long-distance live transportation?

When being transported, animals can experience hunger, thirst, discomfort, pain, frustration, fear and distress, as well as physical welfare problems including injury, disease, and, in the worst cases, death. For these reasons, transport of live animals should be minimised wherever possible and journeys should be kept as short as possible. Specifically, any transport of a live animal that exceeds 8 hours, from loading to unloading, has been shown to decrease welfare significantly. In the case of farmed fish, handling practices and water quality conditions, particularly oxygenation, can have a significant impact on welfare.

No stated position.	0
The company makes a partial commitment to avoid the use of long-distance transport but the scope (in terms of geography, species or products) is not clearly defined.	1
The company makes a partial commitment to avoid the use of long-distance transport and the scope (in terms of geography, species and products) is clearly defined.	3
Universal commitment to avoidance of long-distance live transportation across all species, own-brand and other branded products and geographies.	5
(Max Score 5)	

Governance and Management

Q11. Has the company assigned management responsibility for farm animal welfare to an individual or specified committee?

When looking at the management of farm animal welfare, both oversight and implementation responsibilities are important. Oversight is necessary to ensure that senior management is aware of the business implications of farm animal welfare and is prepared to intervene when needed (e.g. if there are tensions between the organisation's farm animal welfare policy and other business objectives). However, it is often the case that those charged with oversight know relatively little about the specific details of how to effectively manage farm animal welfare. It is, therefore, important that there are individual(s) responsible for ensuring that the farm animal welfare policy is implemented and that farm animal welfare is effectively managed.

No clearly defined management responsibility.	0
Published details of the management position with responsibility for farm animal welfare on a day-to-day basis.	5
Published details of how the board or senior management oversees the implementation of the company's farm animal welfare policy.	5

(Max Score 10)

Q12. Has the company set objectives and targets for the management of farm animal welfare?

Objectives and targets are the point where policy commitments are translated into substantive action, and where resources and responsibilities are allocated for the delivery of these objectives and targets.

No published objectives and targets.	0
Published objectives and targets but with no information on how these are to be achieved.	5
Published objectives and targets together with information on the actions to be taken to achieve these, the resources allocated and the schedule for the delivery of these objectives and targets.	10

(Max Score 10)

Q13. Does the company report on its performance against its animal welfare policy and objectives?

Companies should explain how they have performed against their policy commitments, and against their objectives and targets.

The company does not report on how it has performed against the commitments set out in its overarching policy.	0
The company reports on how it has performed against the commitments set out in its overarching policy.	5
The company does not report on how it has performed against its objectives and targets.	0
The company reports on how it has performed against its objectives and targets.	5

(Max Score 10)

Q14. Does the company describe its internal processes for ensuring that its farm animal welfare policy is effectively implemented?

The effective implementation of a farm animal welfare policy relies on employees who are competent to oversee the implementation of the policy, and on controls that allow the company to respond quickly and effectively in the event of non-compliance with the policy.

No information provided on employee training in farm animal welfare.	0
Specific training provided to employees in farm animal welfare.	5
No information provided on the actions to be taken in the event of non-compliance with the farm animal welfare policy.	0
The company describes the actions it takes in the event of non-compliance with its farm animal welfare policy.	5

(Max Score 10)

Q15. Does the company describe how it implements its farm animal welfare policy (or equivalent) through its supply chain?

Many of the business risks and opportunities associated with farm animal welfare relate to companies' supply chains. Companies have the ability to influence their suppliers' performance both formally (e.g. through contracts, auditing processes) and informally (e.g. through capacity building and education).

No description of processes for implementing farm animal welfare policy through supply chain.	0
No information on how farm animal welfare is included in supplier contracts.	0
Farm animal welfare incorporated into contractual obligations for suppliers but limited by geography and/or certain products or species	3
Farm animal welfare incorporated into contractual obligations for suppliers across all species, products and geographies.	5
No information provided on how supplier compliance with contract conditions is monitored.	0
Farm animal welfare specified as part of supplier auditing programme.	5
No information provided on the specific support and/or education provided to suppliers	0
Specific support and/or education provided to suppliers on farm animal welfare policy/issues.	5
(Max Score 15)	

Q16. Does the company assure its welfare scheme to a prescribed standard?

Farm assurance schemes provide frameworks for managing farm animals, including their health and welfare, provenance and the legal compliance of the systems used. They can also play an important role in promoting higher welfare standards. Where species-specific legislation exists, schemes should ensure that minimum legislative standards are met and preferably schemes should lift the standards above the minimum. Where there is no species-specific legislation, assurance standards are increasingly important for protecting welfare.

No assurance standard specified.	0
A proportion of products audited to basic farm assurance (or equivalent company) standard, but no information on the balance.	3
A proportion of products audited to a combination of basic and higher farm assurance (or equivalent company) standard, but no information on the balance.	6
100% of products audited to basic farm assurance (or equivalent company) standard.	10
100% of products audited to a combination of a basic farm assurance (or equivalent company) standard and a higher welfare assurance (or company equivalent standard).	15
100% of products audited to higher level (or company equivalent) assurance standard.	20
(Max Score 20)	

Innovation and Leadership

Q17. Is the company currently investing in projects dedicated to advancing farm animal welfare practices within the industry?

Farm animal welfare is a collective issue for the food industry as well as being an individual issue for each company in the industry. Making progress and raising standards across the industry requires individual companies to support research and development programmes to improve farm animal welfare, to share their knowledge and expertise with their suppliers and with their industry peers, to play a supportive role in public policy debates around farm animal welfare, and to support industry and stakeholder initiatives directed at improving farm animal welfare.

No evidence of involvement in advancing farm animal welfare beyond company practices.	0
Evidence of current involvement in research and development programmes to improve farm animal welfare.	5
Evidence of active involvement in industry or other initiatives (e.g. working groups, supporting NGO lobbying, responding to government consultations) directed at improving farm animal welfare.	5
(Max Score 10)	

Q18. Has the company received any notable awards or accreditations for its farm animal welfare performance in the last two years?

Awards from credible animal welfare organisations, consumer associations and industry and farming bodies provide tangible evidence that companies are achieving good/best practices in those areas of their operations covered by the awards. Awards can also play an important role within companies through motivating employees and signalling to senior management that farm animal welfare is an area where the organisation is achieving good/best practice.

No evidence of notable awards or accreditations in the last two years.	0
The company has received a notable award or accreditation for a single category or species.	5
The company has received a significant award relating to its efforts across a number of species, or the company has received awards for its efforts on different species.	10

(Max Score 10)

Q19. Does the company promote higher farm animal welfare to consumers through education and/or awareness-raising activities?

Companies have an important role to play in raising awareness of farm animal welfare among their customers and clients. This, in turn, should contribute to increases in demand for higher welfare products.

No evidence of promoting higher farm animal welfare.	0
At least one example of promoting higher farm animal welfare to consumers.	5
Multiple examples of promoting higher farm animal welfare to consumers.	10

(Max Score 10)

Q20a. Does the company have a position on promoting non-animal derived protein alongside animal protein?

There are several drivers for companies offering lifestyle choices for customers through the food they sell, from health and nutritional benefits, to environmental benefits (e.g. reduced greenhouse gases, restoration of biodiversity, soil and water quality), wildlife benefits (e.g. reversing habitat destruction), population benefits (e.g. diverting crops used for animal feed to directly feeding the world's growing population), welfare benefits to animals (e.g. eating less but high welfare animal protein, and cost benefits (e.g. supplementing a proportion of animal protein with plant-based alternatives).

Company has a position on promoting non-animal derived protein alongside animal protein	Yes
Company does not have a position on promoting non-animal derived protein alongside animal protein	No

Q20b. Does the company have a stated commitment to reducing/substituting (at least in part) a proportion of the animal protein it sells?

Company has a stated commitment to reducing/substituting (at least in part) a proportion of the animal protein it sells	Yes
Company does not have a stated commitment to reducing/substituting (at least in part) a proportion of the animal protein it sells	No

Q20c. If yes:**Does the company's stated rationale for promoting non-animal derived protein include: (Tick all that apply)**

Welfare benefits to animals	<input type="checkbox"/>
Human health and nutritional benefits	<input type="checkbox"/>
Environmental benefits	<input type="checkbox"/>
Wildlife benefits	<input type="checkbox"/>
Population benefits	<input type="checkbox"/>
Cost benefits	<input type="checkbox"/>

(Max Score 0)

Performance Reporting and Impact

Q21. Does the company report on the proportion of animals (or volume of fresh or frozen animal products and ingredients) for own-brand products in its global supply chain that is free from close confinement (i.e. those in barn, free range, indoor group housed, outdoor bred/reared)?

In addition to having clear policy commitments and management practices, companies are expected to maintain strict reporting criteria for animals in their supply chain. This question is looking specifically at measures linked to the housing systems and environmental enrichment of animals in their supply chains. This is because many of the most significant farm animal welfare concerns result from close confinement practices and barren living conditions (such as barren battery cages, sow stalls, farrowing crates, veal crates, concentrated animal feeding operations (CAFOs), feedlots, tethered systems, close confinement of solitary finfish species).

No reporting on the proportion of animals free from confinement	0
The company reports on the proportion of animals free from confinement, but this reporting is limited to certain geographies, species or own-brand products.	3
The company reports fully on the proportion of animals free from confinement, covering all relevant geographies, species and own-brand products.	5
(Max Score 5)	

Q22. Does the company report on the proportion of animals for own-brand products in its global supply chain that is free from routine mutilations (i.e. castration, teeth clipping, tail docking, toe clipping, dehorning, desnooding, dewinging, disbudding, mulesing, beak trimming, fin clipping)?

In addition to having clear policy commitments and management practices, companies are expected to maintain strict measurement criteria for animals in their supply chain. This question is looking specifically at measures linked to the routine mutilation of animals in their supply chains.

No reporting on the proportion of animals that are free from routine mutilations	0
The company reports on the proportion of animals that are free from routine mutilations, but this reporting is limited to certain geographies, species or own-brand products.	3
The company reports fully on the proportion of animals that are free from routine mutilations, covering all relevant geographies, species and own-brand products.	5
(Max Score 5)	

Q23. Does the company report on the proportion of animals in its global supply chain that is subject to pre-slaughter stunning?

In addition to having clear policy commitments and management practices, companies are expected to maintain strict measurement criteria for animals in their supply chain. This question is looking specifically at measures linked to the slaughter of animals (or the rendering of fish insensible) in their supply chains. It is essential to render an animal unconscious before it is slaughtered in order for it to be insensible to pain, discomfort and stress, until death occurs.

No reporting on the proportion of animals subject to pre-slaughter stunning.	0
The company reports on the proportion of animals subject to pre-slaughter stunning, but this reporting is limited to certain geographies, species or own-brand products.	3
The company reports fully on the proportion of animals subject to pre-slaughter stunning, covering all relevant geographies, species and own-brand products.	5
(Max Score 5)	

Q24. Does the company report on the average, typical or maximum permitted live transport times for the animals in its global supply chain?

In addition to having clear policy commitments and management practices, companies are expected to maintain strict measurement criteria for animals in their supply chain. This question is looking specifically at measures linked to the live transportation of animals in their supply chains. When being transported, animals can experience hunger, thirst, discomfort, pain, frustration, fear and distress, as well as physical welfare problems including injury, disease, and, in the worst cases, death. For these reasons, transport of live terrestrial animals should be minimised wherever possible and journeys should be kept as short as possible. Specifically, any transport of a live terrestrial animal that exceeds 8 hours, from loading to unloading, has been shown to decrease welfare significantly. In the case of farmed fish, handling practices and water quality conditions (particularly oxygenation) can have a significant impact on welfare. Conditions for transportation of fish must therefore be suitable and a maximum time limit may be required as determined from species-specific welfare risk assessments.

No reporting on live transport times.	0
The company partially reports on the live transport times for animals, but reporting is limited to certain geographies, species or products.	3
The company reports fully on the live transport times for animals, covering all relevant species and geographies.	5
(Max Score 5)	

Q25. Does the company report on welfare outcome measures (i.e. measures linked to the physical, emotional and/or behavioural wellbeing of animals)?

In addition to having clear policy commitments and management practices, companies are expected to maintain strict measurement criteria for animals in their supply chain. This question is looking specifically at welfare outcome measures (WOMs) relating to the physical, emotional and/or behavioural wellbeing of animals. WOMs may be quantitative, or qualitative. They should focus on the most important species-specific measures, of physical wellbeing, mental wellbeing and behaviour.

WOMs might include for example:

For all species: mortality rates

For laying hens: end of lay feather coverage, keel bone fractures, bone breakages at slaughter

For dairy cows: lameness, mastitis, body condition, involuntary culling rate

For pigs: lameness, tail bite and other lesions

For broiler chickens: gait score, footpad dermatitis, hock burn, breast blisters

For beef: body condition, lameness

For rabbits: foot lesions, fur coverage, eye condition

For fish: fin and body damage

For mental wellbeing: reaction to humans or novelty, fear, comfort

For behaviour: time spent lying/resting, ruminating or being active – foraging, perching, dustbathing, socialising

For transportation: injuries, fatigue, road traffic incidents, mortality (dead-on-arrival/DOA)

For slaughter: effectiveness of stunning

No reporting on welfare outcome measures.	0
Partial reporting on welfare outcome measures but reporting is limited to certain species or geographies.	3
Company fully reports on at least one welfare outcome measure per relevant species and/or per relevant geography.	5
(Max Score 5)	

Q26. Does the company provide an explanation of progress and trends in performance (either in terms of input measures or welfare outcome measures)?

Companies should provide an explanation of progress and trends in performance and clearly define the scope of reporting (i.e. by geography, by species, by production system, by welfare outcome).

The company does not report on progress on animal welfare performance (either in terms of input measures or welfare outcome measures).	0
The company reports on progress on at least one animal welfare performance measure (either an input measure or a welfare outcome measure), but this is limited to certain species, products or geographies and there is no explanation of trends in performance.	4
The company reports on progress on at least one animal welfare performance measure (either an input measure or a welfare outcome measure) in its supply chain, but this is limited to certain species, products or geographies, although it does provide an explanation of progress and trends in performance.	6
The company reports on at least one performance measure (either an input measure or a welfare outcome measure) per relevant species across all geographies but there is no explanation of progress or trend in performance.	8
The company reports on at least one performance measure (either an input measure or a welfare outcome measure) per relevant species across all geographies, and it provides an explanation of progress or trend in performance.	10
(Max Score 10)	

Q27. What proportion of laying hens (for shell eggs and fresh/frozen products and ingredients) in the company's global supply chain is cage-free?

Companies making public commitments to source cage-free eggs should report on the proportion of own brand shell eggs and eggs used as ingredients that are from cage-free hens. NB. Companies that report on the proportion of eggs that are cage-free but do not specify the scope will be awarded 1 point. For retailers and wholesalers, this question applies to all own-brand products.

0% of laying hens are cage-free, or no reported information	0
1 – 25% of laying hens are cage-free	1
26 – 50% of laying hens are cage-free	3
51 – 75% of laying hens are cage-free	5
76 – 99% of laying hens are cage-free	7
100% of laying hens are cage-free	10
(Max Weighted Score 1.25 – 5*)	

Q28. What proportion of fresh/frozen pork products and ingredients in the company's global supply chain is sourced from pigs that are free from sow stalls/gestation crates?

Companies making public commitments to source sow-stall-free or gestation crate-free pork should report on the proportion sows that are free from sow stalls. NB. Companies that report on the proportion of pork that is sow stall-free or gestation crate-free but do not specify the scope will be awarded 1 point. For retailers and wholesalers, this question applies to all own-brand products.

0% of sows are free from sow stalls, or no reported information	0
1 – 25% of sows are free from sow stalls/gestation crates	1
26 – 50% of sows are free from sow stalls/gestation crates	3
51 – 75% of sows are free from sow stalls/gestation crates	5
76 – 99% of sows are free from sow stalls/gestation crates	7
100% of sows are free from sow stalls/gestation crates	10
(Max Weighted Score 1.25 – 5*)	

Q29. What proportion of fresh/frozen milk or milk products and ingredients in the company's global supply chain is sourced from cows that are free from tethering?

Companies making public commitments to source milk from dairy cows that are not tethered should report on the proportion of own brand milk and milk products (including ingredients) that are from dairy cows that are not tethered. NB. Companies that report on the proportion of milk or milk products and ingredients that are sourced from cows that are free from tethering but do not specify the scope will be awarded 1 point. For retailers and wholesalers, this question applies to all own-brand products.

0% of dairy cows are free from tethering, or no reported information	0
1 – 25% of dairy cows are free from tethering	1
26 – 50% of dairy cows are free from tethering	3
51 – 75% of dairy cows are free from tethering	5
76 – 99% of dairy cows are free from tethering	7
100% of dairy cows are free from tethering	10

(Max Weighted Score 1.25 – 5*)

Q30. What proportion of broiler chickens for own-brand fresh/frozen products and ingredients in the company's global supply chain is reared at lower stocking densities (specifically, 30 kg/m² or less)?

Companies making public commitments to source broiler chickens to higher welfare standards should report on the stocking densities of own brand fresh and frozen chicken meat and ingredients. NB. Companies that report on the proportion of broiler chickens reared at lower stocking densities but do not specify the scope will be awarded 1 point. Companies will not be scored for reporting on the proportion of broiler chickens that are cage-free. (That is, the actual stocking density or higher welfare/free range systems must be specified). For retailers and wholesalers, this question applies to all own-brand products.

0% of broiler chickens reared at lower stocking densities, or no reported information	0
1 – 25% of broiler chickens are reared at lower stocking densities	1
26 – 50% of broiler chickens are reared at lower stocking densities	3
51 – 75% of broiler chickens are reared at lower stocking densities	5
76 – 99% of broiler chickens are reared at lower stocking densities	7
100% of broiler chickens are reared at lower stocking densities	10

(Max Weighted Score 1.25 – 5*)

Q31. What proportion of laying hens in the company's global supply chain is free from beak trimming or tipping?

Companies should report on the proportion of laying hens that are free from beak trimming or tipping. NB. Companies that report on the proportion of shell eggs or eggs as ingredients that are sourced from laying hens that are free from beak trimming or tipping but do not specify the scope will be awarded 1 point. For retailers and wholesalers, this question applies to all own-brand products.

0% of laying hens are free from beak trimming or tipping	0
1 – 25% of laying hens are free from beak trimming or tipping	1
26 – 50% of laying hens are free from beak trimming or tipping	3
51 – 75% of laying hens are free from beak trimming or tipping	5
76 – 99% of laying hens are free from beak trimming or tipping	7
100% of laying hens are free from beak trimming or tipping	10

(Max Weighted Score 1.66 – 5*)

Q32. What proportion of pigs in the company's global supply chain is free from tail docking?

Companies should report on the proportion of pigs that are free from tail docking. NB. Companies that report on the proportion of fresh/frozen pork products and ingredients that are sourced from pigs that are free from tail docking but do not specify the scope will be awarded 1 point. For retailers and wholesalers, this question applies to all own-brand products.

0% of pigs are free from tail docking, or no reported information	0
1 – 25% of pigs are free from tail docking	1
26 – 50% of pigs are free from tail docking	3
51 – 75% of pigs are free from tail docking	5
76 – 99% of pigs are free from tail docking	7
100% of pigs are free from tail docking	10
	(Max Weighted Score 1.66 – 5*)

Q33. What proportion of dairy cows in the company's global supply chain is free from tail docking?

Companies should report on the proportion of dairy cattle that are free from tail docking. NB. Companies that report on the proportion of fresh/frozen milk products and ingredients that are sourced from cows that are free from tail docking but do not specify the scope will be awarded 1 point. For retailers and wholesalers, this question applies to all own-brand products.

0% of dairy cows are free from tail docking, or no reported information	0
1 – 25% of dairy cows are free from tail docking	1
26 – 50% of dairy cows are free from tail docking	3
51 – 75% of dairy cows are free from tail docking	5
76 – 99% of dairy cows are free from tail docking	7
100% of dairy cows are free from tail docking	10
	(Max Weighted Score 1.66 – 5*)

Q34. What proportion of animals (excluding finfish) in the company's global supply chain is pre-slaughter stunned?

This question is looking specifically at measures linked to the slaughter of animals in their supply chains. It is essential to render an animal unconscious (through for example captive bolt and stun to kill methods including electrical stunning, gas stunning, gas stun to kill) before it is slaughtered in order for it to be insensible to pain, discomfort and stress, until death occurs. NB. Companies that report on the proportion of animals that have been pre-slaughter stunned but do not specify the scope will be awarded 1 point. This question currently excludes finfish because finfish are slaughtered in commercial aquaculture systems using a variety of methods, which, depending on the species and husbandry system, may or may not involve pre-slaughter stunning.)

0% of products are from animals that have been pre-slaughter stunned, or no reported information	0
1 – 25% of products are from animals that have been pre-slaughter stunned	1
26 – 50% of products are from animals that have been pre-slaughter stunned	3
51 – 75% of products are from animals that have been pre-slaughter stunned	5
76 – 99% of products are from animals that have been pre-slaughter stunned	7
100% of products are from animals that have been pre-slaughter stunned	10
	(Max Score 10)

Q35. What proportion of animals (excluding fin fish) in the company's global supply chain is transported within specified maximum journey times?

This question is looking specifically at measures linked to the live transportation of animals in their supply chains. When being transported, animals can experience hunger, thirst, discomfort, pain, frustration, fear and distress, as well as physical welfare problems including injury, disease, and, in the worst cases, death. For these reasons, transport of live terrestrial animals should be minimised wherever possible and journeys should be kept as short as possible. Specifically, any transport of a live terrestrial animal that exceeds 8 hours, from loading to unloading, has been shown to decrease welfare significantly. NB. Companies that report on the proportion of animals that have been transported in 8 hours or less but do not specify the scope will be awarded 1 point.

This question currently excludes finfish because the key welfare issues concern the pumping, crowding and poor handling of finfish, as well the deterioration of water quality, especially the depletion of oxygen or accumulation of carbon dioxide and ammonia.

0% of animals are transported in 8 hours or less, or no reported information	0
1 – 25% of animals are transported in 8 hours or less	1
26 – 50% of animals are transported in 8 hours or less	3
51 – 75% of animals are transported in 8 hours or less	5
76 – 99% of animals are transported in 8 hours or less	7
100% of animals are transported in 8 hours or less	10
	(Max Score 10)

*Notes

1. For questions 26-29, we only assess those questions that are relevant to the company. We assess relevant questions and use the average scores to calculate the overall score for these questions, with the maximum possible score being five (5) points per question.
2. For questions 30-32, we only assess those questions that are relevant to the company. We assess relevant questions and use the average scores to calculate the overall score for these questions, with the maximum possible score being five (5) points per question.

Appendix 2

2018 Benchmark companies

Note: The new companies in the 2018 Benchmark are highlighted in green.

	Company	Ownership	ICB Classification	Country of Origin / Incorporation
1.	Aeon Group	Public	5337: Food Retailers and Wholesalers	Japan
2.	Ahold BV	Public	5337: Food Retailers and Wholesalers	Netherlands
3.	Albertsons	Private	5337: Food Retailers and Wholesalers	USA
4.	Aldi Nord (Aldi Markt)	Private	5337: Food Retailers and Wholesalers	Germany
5.	Aldi Süd/Aldi Einkauf GmbH&Co	Private	5337: Food Retailers and Wholesalers	Germany
6.	Amazon/Whole Foods Market	Public	5337: Food Retailers & Wholesalers	USA
7.	Auchan Holdings	Private	5337: Food Retailers and Wholesalers	France
8.	BJ's Wholesale	Public	5337: Retailers & Wholesalers	USA
9.	C&S Wholesale	Private	5337: Retailers & Wholesalers	USA
10.	Carrefour SA	Public	5337: Food Retailers and Wholesalers	France
11.	Casino Guichard-Perrachon SA	Public	5337: Food Retailers and Wholesalers	France
12.	Cencosud	Public	5337: Retailers & Wholesalers	Chile
13.	China Resources Vanguard	Public	5337: Food Retailers and Wholesalers	China
14.	Colruyt	Private	5337: Retailers & Wholesalers	Belgium
15.	Conad Consorzio Nazionale	Cooperative	5337: Retailers & Wholesalers	Italy
16.	(The) Co-operative Food (UK)	Cooperative	5337: Food Retailers and Wholesalers	UK
17.	Coop Group (Switzerland)/Coop Genossenschaft	Cooperative	5337: Food Retailers and Wholesalers	Switzerland
18.	Coop Italia	Cooperative	5337: Food Retailers and Wholesalers	Italy
19.	Costco Wholesale Corp	Public	5337: Food Retailers and Wholesalers	USA
20.	Couche-Tard	Public	5337: Retailers & Wholesalers	Canada
21.	E Leclerc	Cooperative	5337: Food Retailers and Wholesalers	France
22.	Edeka Zentrale	Private	5337: Food Retailers and Wholesalers	Germany
23.	Empire Company/Sobey's	Public	5337: Retailers & Wholesalers	Canada
24.	H E Butt Company	Private	5337: Retailers & Wholesalers	USA
25.	ICA Gruppen/ICA Eiendom Norge AS	Public	5337: Food Retailers and Wholesalers	Sweden
26.	IKEA (Inter IKEA Group)	Private	5337: Retailers & Wholesalers	Sweden
27.	J Sainsbury PLC	Public	5337: Food Retailers and Wholesalers	UK
28.	Jeronimo Martins	Public	5337: Retailers & Wholesalers	Portugal
29.	(The) Kroger Company	Public	5337: Food Retailers and Wholesalers	USA
30.	Les Mousquetaires	Private	5337: Food Retailers and Wholesalers	France
31.	Lianhua Supermarket Holdings Co	Public	5337: Food Retailers and Wholesalers	China
32.	Lidl Stiftung & Co KG	Private	5337: Food Retailers and Wholesalers	Germany
33.	Loblaw	Public	5337: Food Retailers and Wholesalers	Canada
34.	Marks and Spencer PLC	Public	5337: Food Retailers and Wholesalers	UK
35.	Mercadona SA	Private	5337: Food Retailers and Wholesalers	Spain
36.	Metro AG	Public	5337: Food Retailers and Wholesalers	Germany
37.	Migros-Genossenschafts-Bund	Cooperative	5337: Food Retailers and Wholesalers	Switzerland
38.	Publix Super Markets Inc	Private	5337: Food Retailers and Wholesalers	USA
39.	Rewe Group	Cooperative	5337: Food Retailers and Wholesalers	Germany
40.	Schwarz Unternehmens Treuhand KG/Kaufland	Private	5337: Food Retailers and Wholesalers	Germany
41.	Seven & I Holdings	Public	5337: Food Retailers and Wholesalers	Japan
42.	Super Valu	Public	5337: Retailers & Wholesalers	USA
43.	Sysco Corporation	Public	5337: Food Retailers and Wholesalers	USA
44.	Systeme U Generale	Cooperative	5337: Retailers & Wholesalers	France
45.	Target Corporation	Public	5337: Food Retailers and Wholesalers	USA
46.	Tesco PLC	Public	5337: Food Retailers and Wholesalers	UK
47.	Waitrose	Partnership	5337: Food Retailers and Wholesalers	UK
48.	Walmart Stores/Asda	Public	5337: Food Retailers and Wholesalers	USA
49.	Wesfarmers	Public	5337: Food Retailers and Wholesalers	Australia
50.	Wm Morrison Supermarkets PLC	Public	5337: Food Retailers and Wholesalers	UK
51.	Woolworths Limited	Public	5337: Food Retailers and Wholesalers	Australia
52.	Yonghui Superstores	Public	5337: Food Retailers and Wholesalers	China
53.	Aramark Corporation	Public	5757: Restaurants and Bars	USA
54.	Autogrill SpA	Joint Stock	5757: Restaurants and Bars	Italy
55.	Bloomin' Brands Inc	Public	5757: Restaurants and Bars	USA
56.	Camst – La Ristorazione Italiana Soc. Coop. ARL	Cooperative	5757: Restaurants and Bars	Italy
57.	Chick-Fil-A	Private	5757: Restaurants and Bars	USA
58.	Chipotle Mexican Grill	Public	5757: Restaurants and Bars	USA
59.	CKE Restaurants	Private	5757: Restaurants & Bars	USA
60.	CNHLS	Public	5757: Restaurants & Bars	China
61.	Compass Group PLC	Public	5757: Restaurants and Bars	UK
62.	Cracker Barrel	Public	5757: Restaurants & Bars	USA
63.	Cremonini SpA	Private	5757: Restaurants and Bars	Italy
64.	Darden Restaurants PLC	Public	5757: Restaurants and Bars	USA
65.	Dico's	Public	5757: Restaurants & Bars	China
66.	Domino's Pizza Group PLC	Public	5757: Restaurants and Bars	UK
67.	Dunkin' Brands Inc	Public	5757: Restaurants and Bars	USA
68.	Elior Group	Public	5757: Restaurants and Bars	France
69.	Gategroup Holding AG	Public	5757: Restaurants and Bars	Switzerland

70.	Greggs PLC	Public	5757: Restaurants and Bars	UK
71.	Habib's	Private	5757: Restaurants & Bars	Brazil
72.	JD Wetherspoon PLC	Public	5757: Restaurants and Bars	UK
73.	McDonald's Corporation	Public	5757: Restaurants and Bars	USA
74.	Mitchells & Butlers PLC	Public	5757: Restaurants and Bars	UK
75.	Panera LLC	Private	5757: Restaurants and Bars	USA
76.	Papa John's Pizza	Public	5757: Restaurants & Bars	USA
77.	Restaurant Brands International/Burger King	Public	5757: Restaurants and Bars	Canada
78.	Sodexo	Public	5757: Restaurants and Bars	France
79.	Sonic Corp	Public	5757: Restaurants and Bars	USA
80.	SSP Group Limited	Public	5757: Restaurants and Bars	Sweden
81.	Starbucks Corporation	Public	5757: Restaurants and Bars	USA
82.	Subway/Doctor's Associates Inc	Private	5757: Restaurants and Bars	USA
83.	The Cheesecake Factory	Public	5757: Restaurants & Bars	USA
84.	Urmoe Gruppen AS	Public	5757: Restaurants and Bars	Norway
85.	Wendy's Company (The)	Private	5757: Restaurants and Bars	USA
86.	Whitbread PLC	Public	5757: Restaurants and Bars	UK
87.	Yum! Brands Inc	Public	5757: Restaurants and Bars	USA
88.	2 Sisters Food Group (Boparan Holdings Ltd)	Private	3570: Food Producer	UK
89.	Agro Super	Public	3570: Food Producer	Chile
90.	Arla Foods Ltd	Cooperative	3570: Food Producer	Denmark
91.	Associated British Foods PLC	Public	3570: Food Producer	UK
92.	Barilla SpA	Private	3570: Food Producer	Italy
93.	Bimbo	Public	3570: Food Producer	Mexico
94.	BRF SA	Public	3570: Food Producer	Brazil
95.	Campbell Soup Company	Public	3570: Food Producer	USA
96.	Cargill	Private	3570: Food Producer	USA
97.	Charoen Pokphand Foods (CPF)	Private	3570: Food Producer	Thailand
98.	China Yurun Group Limited	Private	3570: Food Producer	China
99.	Chuying Agro-Pastoral Group	Public	3570: Food Producer	China
100.	Cooke Seafood Inc	Private	3570: Food Producer	USA
101.	ConAgra Brands Inc	Public	3570: Food Producer	USA
102.	Cooperativa Central Aurora Alimentos	Cooperative	3570: Food Producer	Brazil
103.	Cooperl Arc Atlantique	Private	3570: Food Producer	France
104.	Cranswick PLC	Public	3570: Food Producer	UK
105.	Danish Crown AmbA/Tulip	Joint Stock	3570: Food Producer	Denmark
106.	Dean Foods	Public	3570: Food Producer	USA
107.	Ferrero SpA	Joint Stock	3570: Food Producer	Italy
108.	Fonterra	Cooperative	3570: Food Producer	New Zealand
109.	General Mills Inc	Public	3570: Food Producer	USA
110.	Groupe Danone SA	Public	3570: Food Producer	France
111.	Groupe Lactalis	Private	3570: Food Producer	France
112.	Gruppo Veronesi	Private	3570: Food Producer	Italy
113.	Hershey Co	Public	3570: Food Producer	USA
114.	Hilton Food Group	Public	3570: Food Producer	UK
115.	Hormel Foods Corporation	Public	3570: Food Producer	USA
116.	Industrias Bachoco	Public	3570: Food Producer	Mexico
117.	JBS SA	Public	3570: Food Producer	Brazil
118.	Kerry Group	Public	3570: Food Producer	Ireland
119.	Kraft Heinz	Public	3570: Food Producer	USA
120.	LDC Groupe	Private	3570: Food Producer	France
121.	Maple Leaf Foods	Public	3570: Food Producer	Canada
122.	Marfrig Global Foods SA	Public	3570: Food Producer	Brazil
123.	Marine Harvest ASA	Public	3570: Food Producer	Norway
124.	Maruha Nichiro	Public	3570: Food Producer	Japan
125.	Mars Inc	Private	3570: Food Producer	UK
126.	Meiji Holdings	Public	3570: Food Producer	Japan
127.	Minerva Foods	Public	3570: Food Producer	Brazil
128.	Mondelēz International	Public	3570: Food Producer	USA
129.	Müller Group AG	Private	3570: Food Producer	Germany
130.	Nestlé SA	Public	3570: Food Producer	Switzerland
131.	New Hope Liuhe Co Ltd	Public	3570: Food Producer	China
132.	Nippon Meat Packers	Public	3570: Food Producer	China
133.	Noble Foods	Private	3570: Food Producer	UK
134.	OSI Group	Private	3570: Food Producer	USA
135.	Plukon Food Group	Private	3570: Food Producer	Netherlands
136.	Perdue Farms	Private	3570: Food Producer	USA
137.	Premier Foods PLC	Public	3570: Food Producer	UK
138.	Royal FrieslandCampina	Cooperative	3570: Food Producer	Netherlands
139.	Sanderson Farms	Public	3570: Food Producer	USA
140.	Saputo Inc	Public	3570: Food Producer	Canada
141.	Seaboard Corp	Public	3570: Food Producer	USA
142.	Terrena Group	Cooperative	3570: Food Producer	France
143.	Tönnies Group	Private	3570: Food Producer	Germany
144.	Tyson Foods Inc	Public	3570: Food Producer	USA
145.	Unilever NV	Public	3570: Food Producer	Netherlands
146.	US Foods	Private	3570: Food Producer	USA
147.	Vion Food Group	Private	3570: Food Producer	Netherlands
148.	Wens Foodstuffs Group	Private	3570: Food Producer	China
149.	WH Group Ltd	Public	3570: Food Producer	China
150.	Zhongpin Inc	Public	3570: Food Producer	China/USA

References

¹Marshall, B.M. and Levy, S.B. (2011), Food Animals and Antimicrobials Impacts on Human Health. *Clinical Microbiology Reviews*, Vol. 24, No. 4, pp. 2, 718-733.

² Previous Benchmark reports (for 2012-2017) can be downloaded from <https://www.bbfaw.com/publications/>

³ The Benchmark criteria are presented in Appendix 1 to this report, and a fuller description of the criteria and their interpretation is presented in the Methodology Report which accompanies this report. See <https://www.bbfaw.com/publications/>

⁴ Prior to increasing the weighting on performance reporting and impact, we analysed the potential effect of these changes on company rankings in the Benchmark. Our analysis suggested that, assuming no changes in reported company practices or performance, 23 of the 110 companies covered by the 2017 Benchmark were at risk of falling by one Tier in the 2018 Benchmark. We wrote to these 23 companies in early 2018 to advise them of the proposed changes and of the potential impact on their scores.

⁵ A fuller description of the company research process is provided in the Methodology Report which accompanies this report. See <https://www.bbfaw.com/publications/>

⁶ We removed El Corte Inglés and Olav Thon (both on the grounds of their limited animal footprint and their limited potential to influence animal welfare in their operations) and we removed Quick because it is now owned by Burger King France, a subsidiary of Restaurant Brands International.

⁷ The companies with formal universal commitments to the avoidance of close confinement include: Chipotle Mexican Grill, Coop Switzerland, Cranswick, Hilton Food Group and Marks and Spencer.

⁸ http://www.wh-group.com/c/sus_animals.php

⁹ <https://www.chipotle.com/chicken-welfare#>

¹⁰ https://www.mbplc.com/responsibility/goodfood/overarchingpolicy/generalpoliciesapplicabletoallspecies/#link_item_4

¹¹ <https://www.panerabread.com/responsibility>

¹² <https://www.noblefoods.co.uk/wp-content/uploads/2018/07/Dairy-Cow-Animal-Welfare-Policyand-Performance-measures-2018.pdf>

¹³ <https://www.noblefoods.co.uk/wp-content/uploads/2018/04/ANIMAL-WELFARE-POLICY-USAUPDATED-2017.pdf>

¹⁴ <https://www.applegate.com/mission/animal-welfare>

¹⁵ <https://www.cpfworldwide.com/en/sustainability/commitment>

¹⁶ http://media-whgroup.todayir.com/2018042316500030_tc.pdf

¹⁷ https://www.thecheesecakefactory.com/assets/pdf/The_Cheesecake_Factory_Animal_Welfare_Update_July_2018.pdf

¹⁸ <https://www.compass-group.com/en/acting-responsibly/our-pillars/responsible-sourcing/animal-welfare.html>

¹⁹ <https://www.aramark.com/about-us/news/aramark-general/canada-cage-free-commitment>

²⁰ <https://corporate.sonicdrivein.com/animal-welfare/>

²¹ <https://www.tysonfoods.com/sustainability/animal-well-being/research>

²² http://www.kraftheinzcompany.com/pdf/KHC_AnimalWelfarePolicy_10.27.17.pdf

²³ <https://www.coop.ch/content/taten-statt-worte/en/sustainability-topics/animal-welfare/committed-to-animal-welfare/projects.html>

²⁴ <https://sustainability18.barillagroup.com/en/animal-welfare>

²⁵ <http://www.hiltonfoodgroupplc.com/responsibility/animal-welfare>

²⁶ <http://www.co-operativefood.co.uk/globalassets/food-matters/co-op-animal-welfare-standards-and-performance.pdf>

²⁷ https://www.thecheesecakefactory.com/assets/pdf/The_Cheesecake_Factory_Animal_Welfare_Update_July_2018.pdf

²⁸ <https://www.coles.com.au/magazine#view=catalogue2&saleId=22974&page=1>

²⁹ <https://www.tysonfoods.com/sustainability/animal-well-being/research>

³⁰ <https://www.toennies-dialog.de/tierschutz-beim-schlachten/>

³¹ <https://sustainability.asda.com/sites/default/files/4061%20ASDA%20Agriculture%20Story%2048pp%20SQUARE%20WEB.pdf>

³² <https://www.lidl.nl/nl/Kipster-5247.htm>

³³ See Appendix 1 for the full list of questions and see the Methodology Report for a more detailed account of how these questions are assessed.

³⁴ <http://www.co-operativefood.co.uk/globalassets/food-matters/co-op-animal-welfare-standards-and-performance.pdf>

³⁵ https://www.brf-global.com/wp-content/uploads/2018/08/BRF_Anuual_Report_2016_2017_EN.pdf

³⁶ https://www.whitbread.co.uk/~/_media/Files/W/Whitbread/documents/Responsibility/Animal%20Welfare%20Outcome%20Measures%20and%20Key%20Performance%20Indicators.pdf

³⁷ https://www.about.sainsburys.co.uk/~/_media/Files/S/Sainsburys/pdf-downloads/animal-health-and-welfare.pdf

³⁸ https://www.thecheesecakefactory.com/assets/pdf/The_Cheesecake_Factory_Animal_Welfare_Update_July_2018.pdf

³⁹ <https://corporate.marksandspencer.com/plan-a/food-and-household/product-standards/raw-materials-commodities-and-ingredients/beef-lamb-venison#187c27df83704749ac9fd02b03f292e1>

⁴⁰ <https://cranswick.plc.uk/taking-responsibility/animal-welfare>

⁴¹ <https://www.campbellsoupcompany.com/wp-content/uploads/sites/31/2018/08/Animal-Welfare-Guidelines-Updated-081418-clean.pdf>

⁴² We estimate that we have engaged with over 300 institutional investment organisations in this time, and with many of these on multiple occasions.

⁴³ The initiative is now (December 2018) supported by Aberdeen Standard Investments, Australian Ethical Investment, Aviva Investors, BMO Asset Management (EMEA), BNP Paribas Investment Partners, Candriam, Castlefield Investment Partners LLP, Central Finance Board of the Methodist Church, Collier Capital, EdenTree Investment Management, Epworth Investment Management, Karner Blue Capital, NEI Investments, Rathbone Greenbank Investments, Robeco, Schroders, Sonen Capital, The Sustainability Group of Loring, Wolcott & Coolidge Trust LLC, Trillium Asset Management, Triodos Investment Management and Walden Asset Management.

⁴⁴ See Sullivan, R., Amos, N. & Tjärnström, E. (2018), How Companies and Investors are Using the Business Benchmark on Farm Animal Welfare. October 2018 (Business Benchmark on Farm Animal Welfare, London, UK). https://bbfaw.com/media/1538/bbfaw-briefing_company-and-investor-survey-2018-final.pdf

⁴⁵ For a detailed discussion of the animal welfare implications of cloning and genetic engineering, see Peter Stevenson (2012), Cloning and Genetic Engineering of Farm Animals. BBAFW Investor Briefing No. 6 (September 2012) (BBAFW, London), https://www.bbfaw.com/media/1083/briefing-no6_cloning-and-genetic-engineering-of-farm-animals.pdf

⁴⁶ See, further, Vicky Bond and Jemima Jewell (2014), The Impacts of Antibiotic Use in Animals on Human Health and Animal Welfare. BBAFW Investor Briefing No. 17 (BBAFW, London). <http://www.bbfaw.com/media/1070/briefing-17-impacts-of-antibiotic-use-in-animals-on-human-health-and-animal-welfare.pdf>

Related partner initiatives

Compassion in World Farming: Food Business Programme

More than a decade since the launch of the first Good Egg Awards, Compassion's Food Business programme has grown from strength to strength, working with leading retailers, food manufacturers and processors, and food service companies. We engage with more than half of the world's top 250 food companies across Europe, the US, China and more globally through our partner supply chains. To date, over 1.78 billion farm animals are set to lead better lives each year from our food industry partners' higher welfare commitments and practices.



We are passionate about ensuring farm animals lead a good quality of life, experiencing positive mental and physical wellbeing whilst being free to express natural behaviours. Our work to improve welfare standards focuses on key species (laying hens, meat chickens, dairy cows and calves, sows and meat pigs, does and meat rabbits and fish) and addresses important welfare issues such as: confinement, mutilations, barren environments, slaughter, and measuring welfare.

We recognise that producing food today is more challenging and competitive than ever before, with the increasing need to develop a more sustainable food system. We therefore believe it is crucial to ensure that any production system changes are not only fit for purpose, to ensure animals have a good quality of life, but are also a fitting investment for the future too.

We work with companies at the start of their animal welfare journey to develop and strengthen full and transparent welfare policies and strategies. At a deeper level, we can help map out specific welfare issues in their supply chain and plot a course for continuous improvement.

Our approach is collaborative and solutions-led, built on trust and mutual respect and is described by our partners as 'challenging, but supportive, considered and measured' as we keep an eye on future trends and developments.

Our team of specialist professionals have extensive farm animal welfare knowledge, with backgrounds in scientific research, veterinary medicine, supply chain management, corporate social responsibility, and marketing communications. Our resources are evidence-based and include scientific review, rationale and best practice case studies, designed to help companies achieve their goals.

Through our work with food industry partners we are reaching billions of consumers, raising awareness and communicating the need to purchase higher welfare products, bringing them on the journey towards more humane, sustainable food.

Compassion is a founding partner of the Business Benchmark on Farm Animal Welfare (BBFAW). Our team works with many of the benchmarked companies to strengthen their farm animal welfare policy, management, governance and performance impact.

More information on the work of the Food Business team at Compassion in World Farming can be found at www.compassioninfoodbusiness.com

Global Ghost Gear Initiative

The Global Ghost Gear Initiative (GGGI) is a cross-sectoral alliance focused on solving the problem of lost and abandoned fishing gear worldwide. Convened by World Animal Protection in 2015, GGGI aims to improve the health of marine ecosystems, protect marine animals, and safeguard human health and livelihoods. GGGI believes that the solution to this problem lies in working together across all sectors to achieve maximum impact for our oceans and the life within them.

10% of all marine plastic and 70% by weight of macroplastic (pieces greater than 5mm) is fishing-related. Designed specifically to trap and entangle, ghost fishing gear poses a very real threat to marine wildlife. It kills non-target species like whales, seals and turtles; 71% of entanglements involve ghost gear. It continues to catch target species and is a major contributor to fish stock declines. It is a significant cause of gear loss in use and fouls vessels.

GGGI brings together more than 100 stakeholder organisations, including major retailers and food brands, seafood companies, NGOs, governments and intergovernmental organisations to build evidence, define best practice and develop scalable solutions. In 2019, leadership of GGGI will transition from World Animal Protection to Ocean Conservancy.

Find out more at www.ghostgear.org



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For further information please email secretariat@bbfaw.com