The Business Benchmark on Farm Animal Welfare Report 2019

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 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.bbfaw.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. 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 risk and 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 over 50 years. As a global organisation with 14 offices all over the world, they work to improve the welfare of animals. The organisation's activities focus on creating impact at scale – working with governments, international bodies and companies to give animals a better life. They target wild animals in the entertainment and medicine trades, farm animals in industrial systems, animals living in communities and those caught in natural disasters to protect their lives and people who depend on them. World Animal Protection influences decision makers to put animals on the global agenda and inspires individuals, communities and companies to take action.

Through its corporate engagement work, World Animal Protection works with leading food companies across the value chain to support their efforts to improve welfare animal standards in their operations.

To learn more about World Animal Protection's work, our news, successes and how we can support you, please visit **www.worldanimalprotection.org**

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Acknowledgements

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This report is dedicated to Dr Martin Cooke whose passion and dedication to animal welfare significantly contributed to improving the lives of animals throughout his lifetime.

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Foreword

Whether investing in equities, bonds or real assets such as property or infrastructure, integrating environmental, social and governance (ESG) factors into investment decisions and being responsible stewards of clients' assets should be non-negotiable for asset managers. ESG factors can have a material risk on an investment and understanding these issues, and how they shape the wider economy and society, allows us to spot investment risks and opportunities.

Since its inception, BBFAW has presented investors with farm animal welfare-related ESG information in terms that are relevant and aligned to investors' interests. Building on a clear, publicly available methodology, BBFAW enables us to analyse management quality in a systematic and consistent manner. The annual reporting cycle of the Benchmark helps us understand important themes and assess whether companies are improving, stagnating or getting worse. It also helps us gauge whether companies are responding to engagement with their investors.

The 2019 Benchmark reveals how certain leading companies are demonstrating that action on animal welfare is possible within a competitive environment. The number of companies that are considered to have farm animal welfare as an integral part of their business strategy has grown significantly over the eight benchmark cycles, from three (out of 68) in 2012 to 22 (out of 150) in 2019. With 95 companies (63 per cent) now reporting at least some animal welfare performance data, we are beginning to see how companies' management systems and processes are translating into improved welfare outcomes.

Nevertheless, much more needs to be done. The overall average score for performance reporting is just 15 per cent, while far too many low-ranking companies have not changed their practices at all. We hope, as the issue moves further into the mainstream, that next year will see a significant improvement in companies' commitments to improve animal welfare.

Aviva Investors is proud to be a founding signatory of the BBFAW 2016 Global Investor Statement on Farm Animal Welfare – the first of its kind - and consider it a useful way of signalling our interest and intent to the capital markets. The launch of this 2019 BBFAW Benchmark provides further proof that this is an issue that many large investors, and their clients, are increasingly concerned about.

In conclusion, BBFAW has changed the conversation between investors and companies and succeeded in adding farm animal welfare to the spectrum of ESG issues that are considered. We would like to congratulate BBFAW partners, Compassion in World Farming and World Animal Protection, and the BBFAW secretariat, Chronos Sustainability, for their dedication to bringing farm animal welfare onto the investor agenda, and for their tireless work with companies to raise welfare standards for the benefit of the billions of animals farmed for food globally.

Abigail Herron
Global Head of Responsible Investment
Aviva Investors

The 2019 Benchmark
Highlights

The 2019 Benchmark highlights

This is the eighth 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 37 distinct, objective criteria. As such, it is the most authoritative and comprehensive global account of corporate practice on farm animal welfare.

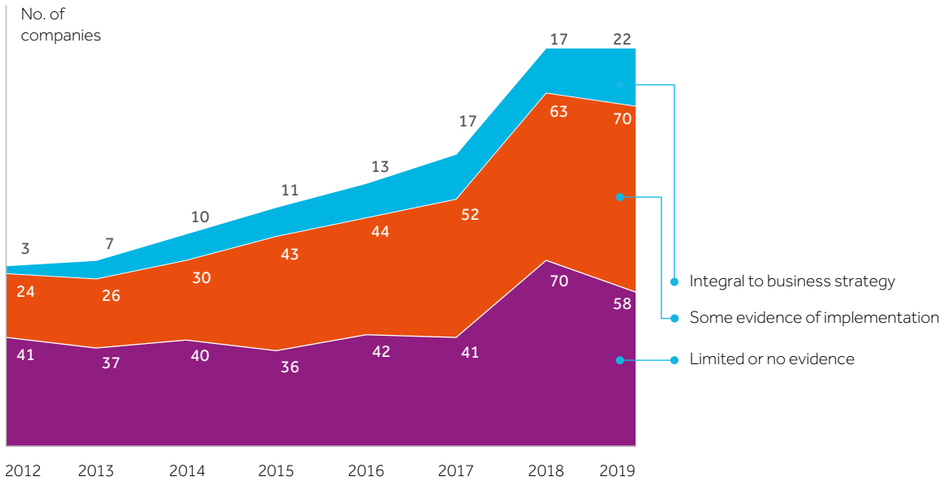
The 2019 Benchmark covers 150 global food companies:

- 52 Retailers and Wholesalers, 63 Producers and Manufacturers, and 35 Restaurants and Bars.
- 50 companies from North America, 70 from Europe and the remaining balance from a mix of countries including Australia, Brazil, China, Japan, New Zealand and Thailand.

Key Findings

1. The pace of change is accelerating – companies increasingly recognise farm animal welfare as integral to their business strategy

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 eight Benchmark cycles, from 3 (out of 68) in 2012 to 22 (out of 150) in 2019. When we note that we added 43 new companies in 2018 (almost all of whom provided limited or no evidence on their approach to farm animal welfare), we can see that the landscape of farm animal welfare is changing dramatically and at a faster pace than in previous years. These improvements are even more striking given the tightening of the Benchmark criteria and the increased emphasis on performance reporting and impact over time.

Our discussions with companies suggest that this acceleration is being driven by consumer interest in farm animal welfare, and the growing salience of the business risks and opportunities associated with farm animal welfare.

The BBFAW continues to be an important driver of change, with companies using the BBFAW to drive continuous improvement in farm animal welfare practices, performance and disclosure, to compare their approach against industry peers, and to raise the profile of animal welfare internally and through their supply chains.

2. Companies are working to ensure their farm animal welfare management systems are effective

A majority of companies are not only formalising their farm animal welfare policies, but are also assigning management responsibilities, providing animal welfare training to employees, setting objectives and targets, and implementing supply chain management processes. Of the 150 companies covered by the 2019 Benchmark, 88 (59%) now have explicit board or senior management oversight of farm animal welfare (compared to just 15 companies (22%) in 2012, and 112 (75%) have published formal improvement objectives for farm animal welfare (compared to 18 companies (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 specialists, and promoting higher animal welfare to consumers.

80%

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

Our analysis of the changes in company tier rankings between 2012 and 2019 (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, 44 (80%) have moved up at least one Tier since 2012; of these, 14 (25%) moved up one Tier, 18 (33%) moved up two Tiers and 12 (22%) 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 2012-2019 (trend companies*)

Down 1 Tier	No Tier change	Up 1 Tier	Up 2 Tiers	Up 3 Tiers
Unilever	Autogrill The Co-op (UK) Gategroup Groupe Lactalis Marfrig Mars McDonald's Müller Group Starbucks Subway	Arla Foods Carrefour Compass Group FrieslandCampina ICA Gruppen J Sainsbury Kaufland Lidl Mercadona Noble Foods Tyson Foods Umoe Gruppen Vion Food Group Wm Morrison	2 Sisters Food Group Associated British Foods Barilla Camst Coop Group (Switzerland) Cremonini Danish Crown Groupe Auchan Groupe Danone JD Wetherspoon Marks & Spencer Metro Mitchells & Butlers REWE Group Tesco Walmart Whitbread Yum! Brands	Aldi Süd Aramark Cargill Cranswick Elior Group Greggs Groupe Casino Migros Nestlé Premier Foods Sodexo Waitrose
1	10	14	18	12

*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.

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

3. Companies are prioritising action on close confinement and non-therapeutic antibiotic use

Many of the major animal welfare issues can be directly attributed to the systems in which animals are raised. Close confinement systems are associated with a higher prevalence of aggression, and other abnormal and stress related behaviours. Furthermore, these systems can lead to a poorer animal health status and potentiate a higher use of antibiotics. This higher usage of antibiotics in close confinement systems happens across the different farmed species and is a key contributor to the wider societal issue of antimicrobial resistance.

The elimination of close confinement and reductions in the use of routine (i.e. non-therapeutic) antibiotics in farming have been key campaigning goals for many animal welfare NGOs in Europe and the US. These issues have also received extensive media coverage. The effects of these pressures are being seen. One hundred and sixteen companies (77%) have made commitments to the avoidance of close confinement in one or more of the major markets in which they operate. 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.

In recent decades, the intensification of animal production due to the increasing demand for products of animal origin has led to an increasing overall use of antimicrobials. In addition, the volume of antimicrobials used also increases when

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global food companies have made commitments to the reduction or avoidance of routine antibiotics in one or more of the major markets in which they operate

specific diseases are being targeted or to prevent the spread of a particular disease, or in times of stress. While the prudent use of antibiotics is important to treat animal diseases, its overuse and misuse can contribute to antimicrobial resistance in both animals and humans. The challenge is to reduce antimicrobial use in livestock production whilst maintaining animal health, welfare and productivity. Ninety-seven companies (65%) have made commitments to the reduction or avoidance of routine antibiotics in animal production. Of these, 22 companies have made universal commitments across all relevant geographies, species and products. Particular efforts are being made by companies to minimise antimicrobial use through, for example, applying good husbandry practices while handling animals; improving animal welfare (e.g. ensuring good air and water supply quality, appropriate ventilation rates and space allocation); ensuring good hygiene, biosecurity measures, and general conditions on farms; applying rigorous disease control measures (e.g. vaccination); using feed ingredients/additives that enhance the efficiency of feed conversion to substitute antibiotics as growth promoters (e.g. in-feed enzymes, probiotics, prebiotics, acidifiers, plant extracts, essential oils and many others).

4. Management systems and processes appear to be delivering better welfare outcomes for farm animals but progress is slow

With 104 companies (69%) now reporting at least some animal welfare performance data, we are beginning to see how companies' management systems and processes are translating into improved welfare outcomes. For example, 12 companies report that 100% of the laying hens in their supply chains are free from close confinement, eight companies report that 100% of pigs in their supply chains are free from sow stalls/gestation crates, and three companies report that more than half of the broiler chickens in their supply chains are kept at or below a maximum stocking density of 30 kg/m^2. Despite some good progress being made by a handful of companies, performance reporting overall remains weak, with companies achieving an average score of just 15% for the performance section. This suggests that while companies have strengthened their farm animal welfare management systems and processes, they have yet to translate this effort into improved welfare outcomes for animals. While we recognise that it takes time for companies to reach a stage where they are confident in the data they report, we would expect to see improvements in the scoring of this section of the Benchmark in the future. This will require companies both to expand the scope of their performance reporting to cover relevant species and welfare topics, and to more accurately report on their welfare impacts as a proportion of their global supply chains.

5. The UK has a clear leadership position

The UK continues to lead the global food industry on farm animal welfare management, reporting and performance. Companies that are domiciled in the UK are also making the most progress year-on-year in both their governance of farm animal welfare and their performance reporting on farm animal welfare.

UK companies achieved an average score of 64% compared to 40% for companies in Europe (excluding the UK) and 34% for all companies covered by the Benchmark.

6. Food companies are starting to address systemic challenges to driving higher welfare standards

In our 2019 survey of how companies use the Benchmark, customer willingness to pay continues to be the principal barrier to adopting higher standards of farm animal welfare, with 79% of companies identifying this as a key concern. This is despite recent evidence that consumers are more willing to pay higher costs when they have been provided with more knowledge about animal welfare[1].

Companies also indicated a possible conflict between higher animal welfare production and other sustainability issues (cited by 47% of respondents), while 43% cited a lack of concern by suppliers and/or business customers, who considered their current approach to be adequate.

In response to these challenges, 86% of companies responding to our survey indicated that they are engaging with suppliers to exchange knowledge, and 44% are providing financial incentives (e.g. price premiums, extended term contracts, contracts based on cost-of-production) for suppliers. The fact that 68% of company respondents are partnering with industry stakeholders indicates a willingness by food companies to work collaboratively to advance animal welfare standards.

69%

of companies report some animal welfare performance data, but the overall average score for performance reporting is just 15%

UK companies achieved an average score of

64%

compared to 34% for all companies covered by the Benchmark.

68%

of companies are partnering with industry stakeholders to advance animal welfare.

1. The 2019 Benchmark
An overview

The Benchmark structure

This is the eighth Business Benchmark on Farm Animal Welfare (BBFAW) report[2]. 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 core areas as indicated in Table 1.1[3].

Table 1.1: Benchmark elements

Pillar	Key elements	% weighting
1. Management Commitment	• 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, environmental enrichment, routine mutilations, antibiotic usage, pre-slaughter stunning, and long-distance live transportation.	26
2. Governance and Management	• 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.	28
3. Leadership and Innovation	• 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
4. Performance Reporting and Impact	• Reporting on farm animal welfare performance measures such as the proportion of animals free from confinement and from routine mutilations, the proportion of animals pre-slaughter stunned, and permitted live transport times. • Impact on key farm animal welfare issues, such as the actual proportion of animals free from close confinement, the proportion of animals free from routine mutilations, the proportion of animals pre-slaughter stunned and the proportion of animals transported within specified maximum journey times.	35

The full evaluation criteria are provided in Appendix 1.

The benchmarking process[4]

Companies were assessed solely on the basis of information published at the time of the assessments (August-October 2019). 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 to review their draft assessments to check the factual accuracy of the assessment and to ensure that all relevant information had been considered by the assessor.

4

companies assessed for the first time in 2019

Companies covered

The 2019 Benchmark assessed 150 companies. Some minor changes were made to the universe of companies following changes to ownership as follows:

- SuperValu was assessed as part of its parent company, United Natural Foods Inc (UNFI).
- Panera Bread was assessed as part of its parent company, JAB Holding Company.
- Sonic Corporation was assessed as part of its parent company, Inspire Brands Inc.
- Coles Supermarkets was assessed as a separate entity following the demerger of Coles Group from Wesfarmers. Wesfarmers was removed from the 2019 company scope.

These changes meant that UNFI, JAB Holding Company, Inspire Brands, and Coles Group were assessed for the first time in 2019.

Additionally, two companies were renamed following changes to their trading name:

- Marine Harvest SA is now listed as Mowi ASA.
- Nippon Meat Packers is now listed as Nippon Ham.

A full list of the companies covered by the 2019 Benchmark is provided in Appendix 2.

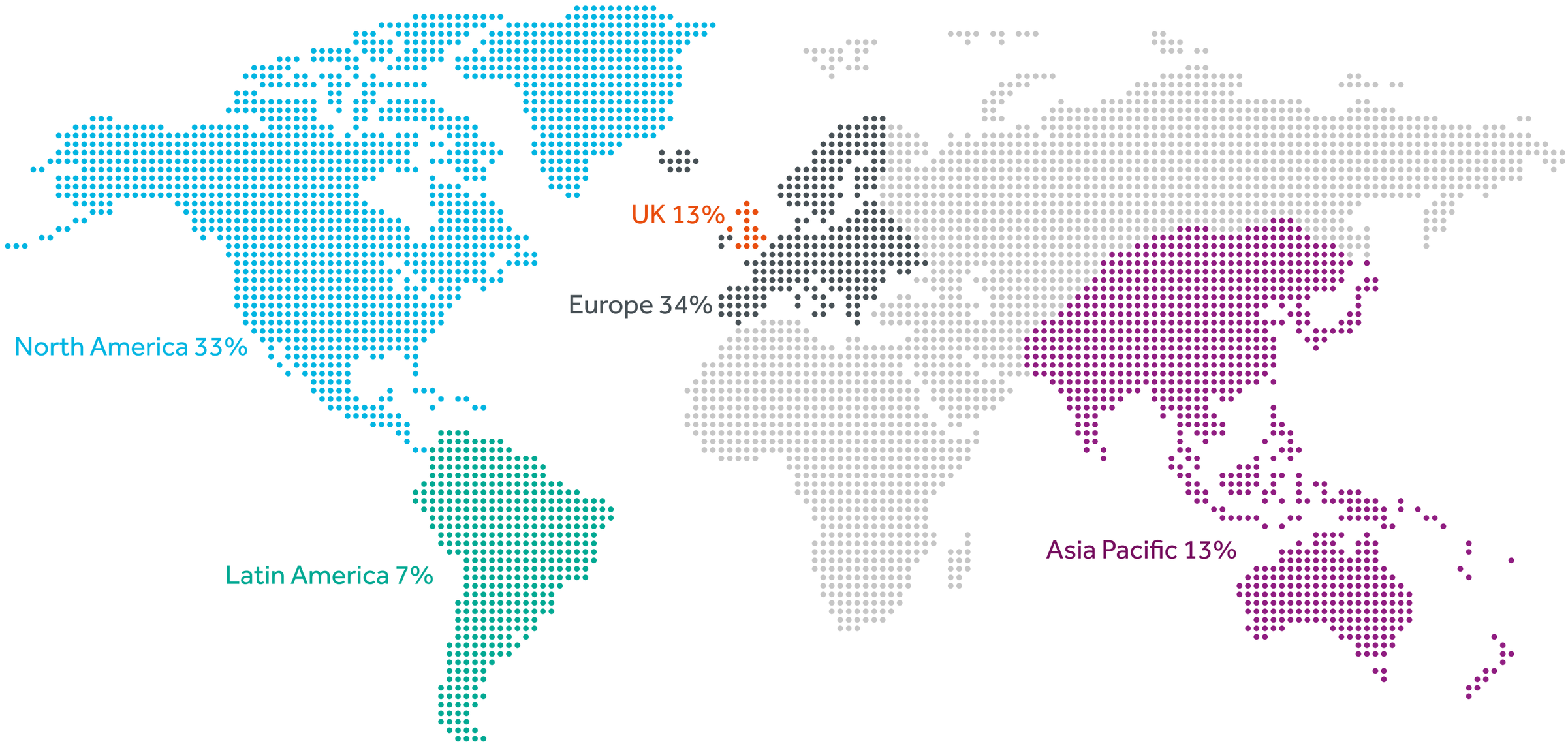
As a result of these changes, the 2019 Benchmark covered (see Appendix 2):

- 94 public companies (92 in 2018)
- 38 private companies (40 in 2018)
- 14 cooperatives
- 4 joint stock/partnership owned companies.

The changes also meant that the 2019 Benchmark covered one new country, Luxembourg, due to JAB Holding Company being domiciled in this country.

The total number of countries of origin covered by the BBFAW increased from 23 in 2018 to 24 in 2019.

Figure 1.1: Geographic distribution of the companies covered by the 2019 Benchmark



In terms of the distribution of companies by sub-sector, the 2019 Benchmark covered:
52 Retailers & Wholesalers, 63 Producers & Manufacturers and 35 Restaurants & Bars.

Global power of BBFAW companies

US$2.5 trillion
combined retail revenues of
BBFAW retailers and wholesalers

US$500 billion
combined revenues of
BBFAW producers and processors

US$220 billion
combined revenues of
BBFAW restaurants and bars

2. The 2019 Benchmark Results

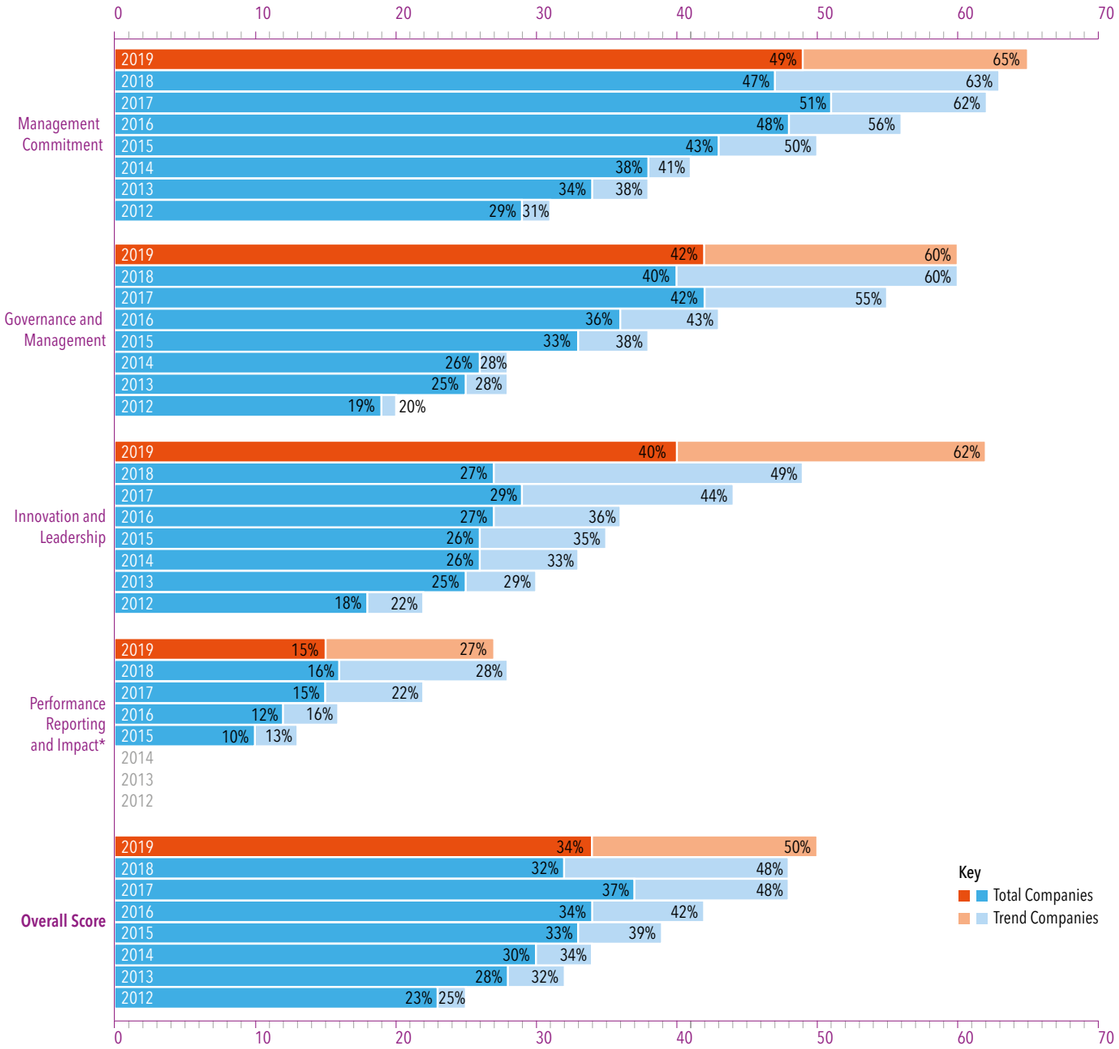
Overall results

The pace of change is accelerating: companies increasingly recognise farm animal welfare as integral to their business strategy.

The headline finding from the 2019 Benchmark is that farm animal welfare leadership and improved management practices are increasingly becoming institutionalised, with more than 60% of the world's largest food companies (corresponding to those companies in Tiers 1 to 4) focusing efforts to ensure that farm animal welfare is effectively managed. The average score for all companies covered in the 2019 Benchmark was 34%, which is a slight increase on the average score of 32% in 2018. This score continues to be skewed downward by the 43 companies added to the Benchmark in 2018, with the new companies achieving an average score of just 20% in 2019 (against 16% in 2018). The average score has also been marginally affected by the adjustment to the weighting of scores for the performance questions in 2019. A more accurate picture of the performance of food companies on farm animal welfare can be obtained by excluding the companies introduced to the Benchmark in 2018 (see Figure 2.1). This shows an overall average score of 40% (an increase of +3% from 2017), including the adjustment to the weighting of scores for performance questions (see page 20) or 41% when scored without the adjustment in 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 2012-2019)†



*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.

Food companies are strengthening their governance and management of farm animal welfare. For example:

- 86% of companies are engaging with suppliers to exchange knowledge.
- 78% of companies are adding animal welfare expertise to their teams.
- 74% of companies have spent time attending animal welfare seminars and training events.
- 68% are partnering with other industry stakeholders.
- 44% of companies are providing financial incentives for suppliers and producers.
- 22% are incorporating animal welfare key performance indicators (KPIs) as part of senior management remuneration.

Company rankings and performance

These improvements are 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 2019.

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%

Figure 2.2: Company rankings

Tier 1 – Leadership

6

- Coop Group (Switzerland)
- Cranswick
- Marks & Spencer
- ▲ Migros
- Waitrose
- Noble Foods

Tier 2 – Integral to business strategy

16

- ▲ ALDI Süd
- Cargill
- ▲ Chipotle Mexican Grill
- The Co-op (UK)
- ▲ Danish Crown
- Greggs PLC
- Groupe Danone
- ▲ Hilton Food Group
- J Sainsbury
- ▲ Mitchells & Butlers
- ▲ Nestlé
- Perdue Farms
- ▲ Premier Foods
- Tesco
- Whitbread
- Wm Morrison

Tier 3 – Established but work to be done

32

- 2 Sisters Food Group
- ALDI Nord
- Aramark
- Arla Foods Ltd
- Barilla SpA
- BRF SA
- Casino
- Cheesecake Factory (The)
- ✸ Coles Group
- Compass Group
- Domino's Pizza Group
- Elior Group
- ▲ Fonterra
- Hormel Foods
- ICA Gruppen
- JBS
- JD Wetherspoon
- ▲ LDC
- ▲ Les Mousquetaires
- ▲ Maple Leaf Foods
- McDonald's
- Metro AG
- ▲ Mowi ASA
- REWE Group
- Royal FrieslandCampina
- Sodexo
- ▲ Terrena Group
- Tyson Foods Inc
- ▼ Unilever
- ▼ Vion Food Group
- Woolworths Limited
- Yum! Brands Inc

Tier 4 – Making progress on implementation

38

- ▲ Agro Super
- ▲ Associated British Foods
- ▲ Auchan Holdings
- Camst
- ▲ Campbell Soup Company
- Carrefour
- Charoen Pokphand Foods (CPF)
- Coop Italia
- ▲ Coopérative U Enseigne
- ▲ Cooperl Arc Atlantique
- ▲ Colruyt
- Costco
- Cremonini SpA
- ▲ Darden Restaurants
- ▲ Edeka
- Ferrero
- ▲ General Mills Inc
- Gruppo Veronesi
- IKEA (Inter IKEA Group)
- ▲ Jeronimo Martins
- ▼ KraftHeinz
- Kroger Company (The)
- ▼ Lidl Stiftung & Co KG
- ▼ Marfrig Alimentos SA
- OSI Group
- Plukon Food Group
- Publix Super Markets
- Restaurant Brands International/Burger King
- Saputo
- Schwarz Unternehmens Treuhand KG/Kaufland
- ▲ SSP Group
- ▲ Subway/Doctor's Associates Inc
- ▲ Sysco Corporation
- Tönnies Group
- ✸ United Natural Foods Inc (UNFI)
- Walmart Inc/Asda
- Wendy's Company (The)
- WH Group

Tier 5 – On the business agenda but limited evidence of implementation

28

- Ahold Delhaize
- Albertsons
- Amazon/Whole Foods Market
- Chick-fil-A
- CKE Restaurants
- ConAgra Brands
- Cooperativa Centrale Aurora Alimentos
- Cracker Barrel
- Dean Foods
- ▼ Dunkin' Brands
- ▲ E.Leclerc
- Empire Company/ Sobey's
- Groupe Lactalis
- H E Butt Company
- Hershey Co
- ✸ Inspire Brands
- ✸ JAB Holdings
- Kerry Group
- ▼ Loblaw Companies Limited
- Mercadona
- ▲ Minerva Foods
- ▼ Mondelēz International
- Papa John's Pizza
- Sanderson Farms
- Seaboard Corp
- Starbucks Corporation
- Target Corporation
- Umoe Gruppen

Tier 6 – No evidence on the business agenda

30

- Aeon Group
- Autogrill SpA
- Bimbo
- BJ's Wholesale Club Holdings
- Bloomin' Brands Inc
- C&S Wholesale
- Cencosud
- China Resources Vanguard
- China Yurun Group Limited
- Chuying Agro-Pastoral Group
- CNHLS
- Conad Consorzio Nazionale
- Cooke Seafood Inc
- Couche-Tard
- Dicos/Ting Hsin International Group
- Gategroup Holding AG
- Habib's
- Industrias Bachoco
- Lianhua Supermarket Holdings Co
- Meiji Holdings
- Mars Inc
- Maruha Nichiro Group
- Müller Group AG
- New Hope Liuhe Co Ltd
- Nippon Ham
- Seven & i Holdings
- US Foods
- Wens Foodstuff Group
- Yonghui Superstores Co Ltd
- Zhongpin Inc

Key

- ■ 2019
- ▲ Up at least 1 tier
- ▼ Down at least 1 tier
- – Non-mover
- ✸ New company

Table 2.2: Number of companies by Tier 2012–2019

Tier	Number of Companies							
	2012	2013	2014	2015	2016	2017	2018	2019
1. The company has taken a leadership position on farm animal welfare	0	2	3	4	6	5	5	6
2. The company has made farm animal welfare an integral part of its business strategy	3	5	7	7	7	12	12	16
3. The company has an established approach to farm animal welfare but has more work to do to ensure it is effectively implemented	6	10	14	16	22	29	34	32
4. The company is making progress on implementing its policies and commitments on farm animal welfare	18	16	16	27	22	23	29	38
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	28
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	30
Total	**68**	**70**	**80**	**90**	**99**	**110**	**150**	**150**

The key point to highlight is the substantial progress that is being made by companies to implement farm animal welfare into their business processes and strategy. With 30 companies having moved up at least one tier in the 2019 Benchmark, there are now 22 companies who are considered to have made farm animal welfare an integral part of their business strategy (corresponding to Tiers 1 and 2), and 70 companies who are implementing their policies and commitments on farm animal welfare (corresponding to Tiers 3 and 4).

The Benchmark data confirm that improved leadership and management practices for farm animal welfare are starting to become institutionalised. Of the 150 companies covered by the Benchmark, 88 (59%) now have explicit board or senior management oversight of farm animal welfare (compared to 43% in 2018), and 112 (75%) now have published formal improvement objectives for farm animal welfare (compared to 71% in 2018). 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.

Despite the year-on-year progress, there is still much to be done. Fifty-eight 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. In fact, 38 companies (25%) do not even publish a farm animal welfare policy. We clearly have much to do if we are to get to the point where farm animal welfare is well managed by the food industry globally.

Thirty of the 150 companies assessed in 2018 (see the list in Table 2.3) improved by at least one Tier in the 2019 Benchmark. This is the largest year-on-year increase we have seen since the Benchmark was established in 2012. Eight companies did fall by one Tier (see Table 2.4), a figure that is broadly in line with previous years. Of these, five were directly impacted by the changes in weighting made in the 2019 Benchmark.

30

companies have improved by at least one Tier between 2018 and 2019

Table 2.3: Companies improving by at least one Tier between 2018 and 2019

Retailers and Wholesalers	Producers and Manufacturers	Restaurants and Bars
Aldi Süd	Agro Super	Chipotle Mexican Grill
Auchan	Associated British Foods	Darden Restaurants PLC
Colruyt	Campbell Soup Company	Mitchells & Butlers PLC
Coopérative U Enseigne (formerly Systeme U)	Cooperl Arc	SSP Group
E Leclerc	Danish Crown	Subway/Doctor's Associates Inc
Edeka Group	Fonterra	
Jeronimo Martins	General Mills	
Les Mousquetaires	Hilton Food Group	
Migros	LDC	
Sysco Corp	Maple Leaf Foods	
	Minerva Foods	
	Mowi (formerly Marine Harvest)	
	Nestlé	
	Premier Foods	
	Terrena Group	

Table 2.4: Companies falling by one Tier* between 2018 and 2019

Retailers and Wholesalers	Producers and Manufacturers	Restaurants and Bars
Lidl	KraftHeinz	Dunkin' Brands
Loblaw	Marfrig Alimentos SA	
	Mondelēz International	
	Unilever NV	
	Vion Food Group	

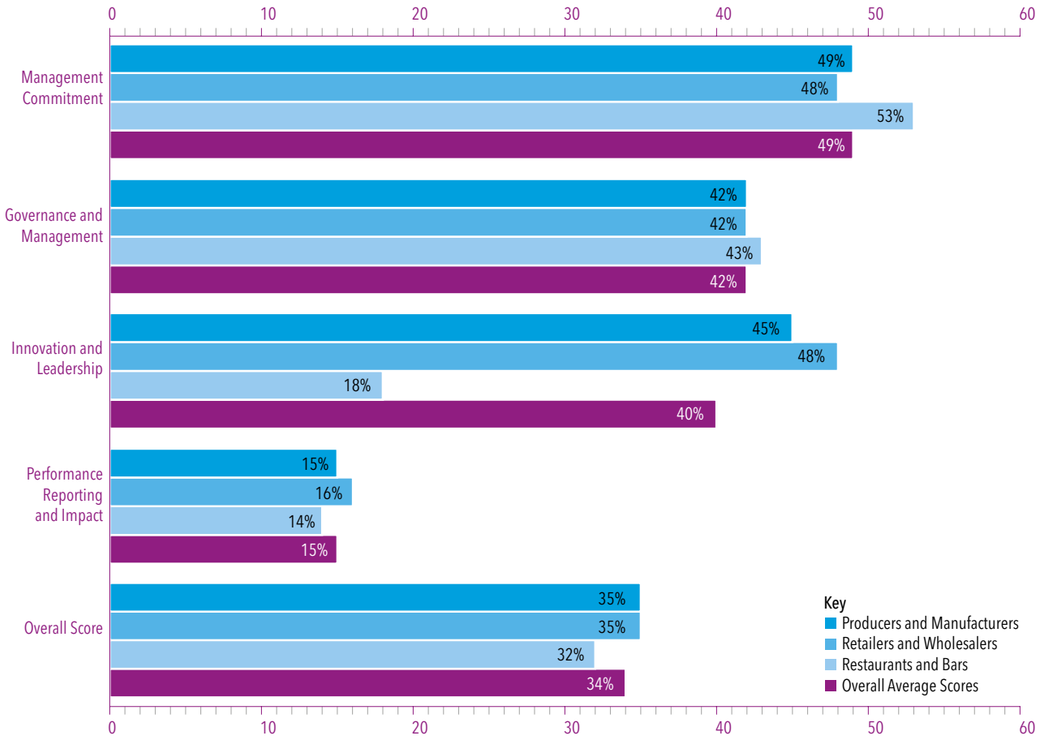
*No company fell by more than 1 Tier

Analysis of impact of adjustment to the weighting of performance questions

This year, we adjusted the weighting of the performance question scores to place greater emphasis on welfare impacts. This means that the 10 questions relating to welfare impact now account for 56% of the weighting of the Performance Reporting and Impact section. This change resulted in a 1% reduction in average overall scores. It also resulted in 10 companies being ranked one Tier lower than they would have ranked without the scoring adjustment and one company being ranked one Tier higher.

Figure 2.3 presents the results of the 2019 Benchmark by sub-sector. The most notable finding is that the restaurants and bars sector has started to once again[5] lag behind the food retailer and producer and manufacturer sectors. While the food retailer and producer and manufacturer sectors both improved their average overall scores to 35% (from 32% and 31% in 2018 respectively), the restaurants and bars sector score has remained static at 32%. It is, however, relevant to note that this follows a number of years where the restaurants and bar sector rapidly closed the gap on the other two subsectors.

Figure 2.3: Sub-sector comparison 2019



Figures 2.4, 2.5 and 2.6 present a listing of all companies in each Tier, by sub-sector.

Figure 2.4: Retailers and Wholesalers

Tier 1 – Leadership (4)
- Coop Group (Switzerland)
- Marks & Spencer PLC
- ▲ Migros
- Waitrose

Tier 2 – Integral to business strategy (5)
- ▲ ALDI Süd/Aldi Einkauf GmbH&Co
- J Sainsbury PLC
- Tesco PLC
- The Co-op (UK)
- Wm Morrison Supermarkets PLC

Tier 3 – Established but work to be done (8)
- ALDI Nord (ALDI Markt)
- Casino Guichard-Perrachon SA
- ✸ Coles Group
- ICA Gruppen AB
- ▲ Les Mousquetaires
- Metro AG
- REWE Group
- Woolworths Limited

Tier 4 – Making progress on implementation (16)
- ▲ Auchan Holdings
- Carrefour SA
- ▲ Colruyt
- Coop Italia
- ▲ Coopérative U Enseigne
- Costco Wholesale Corporation
- ▲ Edeka Group
- IKEA (Inter IKEA Group)
- ▲ Jeronimo Martins
- Kroger Company (The)
- ▼ Lidl Stiftung & Co KG
- Publix Super Markets Inc
- Schwarz Unternehmens Treuhand KG/Kaufland
- ▲ Sysco Corporation
- ✸ United Natural Foods Inc (UNFI)
- Walmart Inc/Asda

Tier 5 – On the business agenda but limited evidence of implementation (9)
- Ahold Delhaize
- Albertsons
- Amazon/Whole Foods Market
- ▲ E.Leclerc
- Empire Company/ Sobey's
- H E Butt Company
- ▼ Loblaw Companies Limited
- Mercadona SA
- Target Corporation

Tier 6 – No evidence on the business agenda (10)
- Aeon Group
- BJ's Wholesale Club Holdings
- C&S Wholesale
- Cencosud
- China Resources Vanguard
- Conad Consorzio Nazionale
- Couche-Tard
- Lianhua Supermarket Holdings Co
- Seven & i Holdings
- Yonghui Superstores Co Ltd

Key
- ■ 2019
- ▲ Up at least 1 tier
- ▼ Down at least 1 tier
- Non-mover
- ✸ New company

Figure 2.5: Restaurants and Bars

Tier 1 – Leadership (0)

Tier 2 – Integral to business strategy (4)
- ▲ Chipotle Mexican Grill
- Greggs PLC
- ▲ Mitchells & Butlers PLC
- Whitbread PLC

Tier 3 – Established but work to be done (9)
- Aramark Corporation
- Compass Group PLC
- Domino's Pizza Group PLC
- Elior
- JD Wetherspoon PLC
- McDonald's Corporation
- Sodexo
- The Cheesecake Factory
- Yum! Brands Inc

Tier 4 – Making progress on implementation (7)
- Camst – La Ristorazione Italiana Soc. Coop. ARL
- Cremonini SpA
- ▲ Darden Restaurants PLC
- Restaurant Brands International/Burger King
- ▲ SSP Group
- ▲ Subway/Doctor's Associates Inc
- Wendy's Company (The)

Tier 5 – On the business agenda but limited evidence of implementation (9)
- Chick-fil-A
- CKE Restaurants
- Cracker Barrel
- ▼ Dunkin' Brands Inc
- ✸ Inspire Brands Inc
- ✸ JAB Holdings
- Papa John's Pizza
- Starbucks Corporation
- Umoe Gruppen AS

Tier 6 – No evidence on the business agenda (6)
- Autogrill SpA
- Bloomin' Brands Inc
- CNHLS
- Dicos/Ting Hsin International Group
- Gategroup Holding AG
- Habib's

Key
- ■ 2019
- ▲ Up at least 1 tier
- ▼ Down at least 1 tier
- Non-mover
- ✸ New company

Figure 2.6: Producers and Manufacturers

Tier 1 – Leadership (2)
- Cranswick PLC
- Noble Foods

Tier 2 – Integral to business strategy (7)
- Cargill
- ▲ Danish Crown AmbA/ Tulip
- Groupe Danone SA
- ▲ Hilton Food Group
- ▲ Nestlé SA
- Perdue Farms
- ▲ Premier Foods PLC

Tier 3 – Established but work to be done (15)
- 2 Sisters Food Group (Boparan Holdings Ltd)
- Arla Foods Ltd
- Barilla SpA
- BRF SA
- ▲ Fonterra Co-operative Group Limited
- Hormel Foods Corporation
- JBS SA
- ▲ LDC Groupe
- ▲ Maple Leaf Foods
- ▲ Mowi ASA
- Royal FrieslandCampina
- ▲ Terrena Group
- Tyson Foods Inc
- ▼ Unilever NV
- ▼ Vion Food Group

Tier 4 – Making progress on implementation (15)
- ▲ Agro Super
- ▲ Associated British Foods PLC
- ▲ Campbell Soup Company
- Charoen Pokphand Foods (CPF)
- ▲ Cooperl Arc Atlantique
- Ferrero SpA
- ▲ General Mills Inc
- Gruppo Veronesi
- ▼ KraftHeinz
- ▼ Marfrig Alimentos SA
- OSI Group
- Plukon Food Group
- Saputo Inc
- Tönnies Group
- WH Group Ltd

Tier 5 – On the business agenda but limited evidence of implementation (10)
- ConAgra Brands Inc
- Cooperativa Centrale Aurora Alimentos
- Dean Foods
- Groupe Lactalis
- Hershey Co
- Kerry Group
- ▲ Minerva Foods
- ▼ Mondelēz International
- Sanderson Farms
- Seaboard Corp

Tier 6 – No evidence on the business agenda (14)
- Cooke Seafood Inc
- Bimbo
- China Yurun Group Limited
- Chuying Agro-Pastoral Group
- Industrias Bachoco
- Mars Inc
- Maruha Nichiro Group
- Meiji Holdings
- Müller Group AG
- New Hope Liuhe Co Ltd
- Nippon Ham
- US Foods
- Wens Foodstuff Group
- Zhongpin Inc

Key
- ■ 2019
- ▲ Up at least 1 tier
- ▼ Down at least 1 tier
- Non-mover
- ✸ New company

Our analysis based on country of origin (see Figure 2.7) shows that UK domiciled companies, with an average score of 64%, continue to lead the food sector on farm animal welfare. In fact, the average scores for UK companies in the three main Benchmark elements (Management Commitment and Policy, Governance and Management and Performance Reporting and Impact) were more than 1.5 times higher than those for European companies. The strongest overall performance came from UK retailers, who achieved the highest average scores for Governance and Management (87%) and Performance Reporting and Impact (61%). These are significant improvements on 2018, when UK retailers achieved average scores of 74% and 42% respectively for these sections. It is also notable that UK restaurants and bars achieved the highest overall average score for Management Commitment and Policy at 91%, indicating a strong focus from foodservice companies on clarifying their management commitments on key welfare issues.

Figure 2.7: Geographic comparison

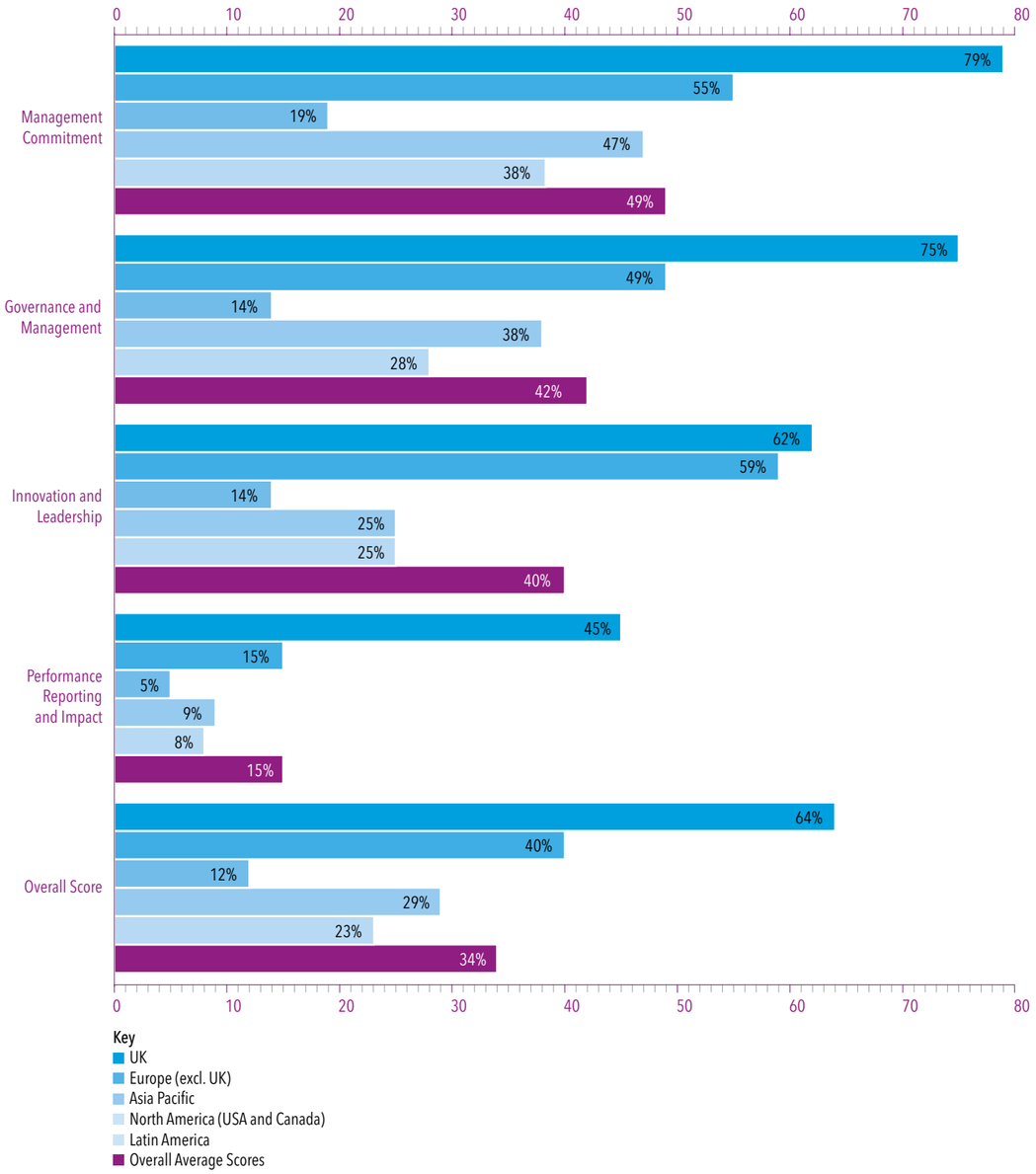


Figure 2.8: Geographic and sector comparisons (average scores, %)

Food Producers	UK	Europe (excl. UK)	Asia Pacific	North America (USA and Canada)	Latin America
Management Commitment	69	57	21	50	45
Governance and Management	65	52	14	42	35
Innovation	57	66	11	44	31
Performance Reporting	41	19	5	9	10
Overall Score	57	43	12	33	29
No. of Companies	7	19	11	18	8

Food Retailers/ Wholesalers	UK	Europe (excl. UK)	Asia Pacific	North America (USA and Canada)	Latin America
Management Commitment	78	57	20	38	14
Governance and Management	87	51	18	26	0
Innovation	96	65	21	17	0
Performance Reporting	61	16	6	5	0
Overall Score	76	42	15	21	4
No. of Companies	6	23	7	15	1

Restaurants & Bars	UK	Europe (excl. UK)	Asia Pacific	North America (USA and Canada)	Latin America
Management Commitment	91	43	0	53	0
Governance and Management	74	37	0	43	0
Innovation	33	28	0	10	0
Performance Reporting	35	7	0	12	0
Overall Score	60	27	0	31	0
No. of Companies	6	9	2	17	1

The second highest region was Europe (excluding the UK), which achieved an average score of 40%. Here, food retailers and food producers achieved broadly the same overall average scores (42% and 43% respectively), but were significantly ahead of restaurants and bars, whose average score was just 27%.

Other geographic regions lag. The average score for North American companies was 29%, for Latin American companies 23% and for Asia-Pacific companies just 12%. We should note that the lower scores for Asia-Pacific companies reflects the fact that many of the new companies introduced to BBFAW in 2018 came from this region.

Farm animal welfare policies

One hundred and thirty-one (87%) of the 150 companies covered by the 2019 Benchmark acknowledge farm animal welfare as a relevant business issue, and 112 companies (75%) now have formal overarching policies on farm animal welfare. Nevertheless, some 38 (25%) major food companies have no formal policy commitments on farm animal welfare.

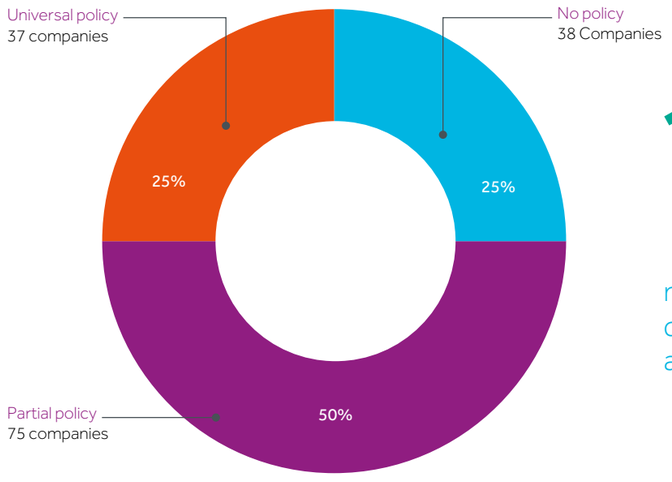
Figure 2.9 shows that the scope (or coverage) of many farm animal welfare policies is either poorly defined or is limited to specific geographies, specific species and/or specific brands. In practice, different species and different farm animal welfare issues receive different levels of attention. Companies 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. Of particular note, the welfare of farmed fish is frequently overlooked by companies when setting out their management commitments in a farm animal welfare policy statement. Despite these shortcomings, 69% of policies now apply to all relevant geographies, 54% apply to all relevant species, and 52% apply to all relevant products. With 37 companies having adopted universal policies (compared to 44 in 2018), it is evident that further effort is needed by food companies to improve the coverage of their farm animal welfare policy statements.

The overall score for restaurants and bars in the UK was

60%

compared to 31% in the US and Canada and 27% in Europe

Figure 2.9: Formal animal welfare policies



1 in 4

major food companies does not have a farm animal welfare policy

One-quarter of corporate animal welfare policies are universally applicable, meaning that they apply to all geographies the company operates in, to all species the company uses and to all products prepared, sold or served by the company.

Figure 2.10 shows how companies are continuing to strengthen their management commitments across the spectrum of key welfare topics. The high proportion of companies with policies on the avoidance of close confinement and on the reduction or elimination of routine antibiotics reflects the significant and sustained pressure – from NGOs, consumers, regulators and investors – on these issues in recent years. For example, in the case of close confinement, 116 companies (77%) have made commitments to the avoidance of close confinement. However, only six (4%) of the 150 companies have made universal commitments to the avoidance of close confinement (covering all relevant species, geographies and products).

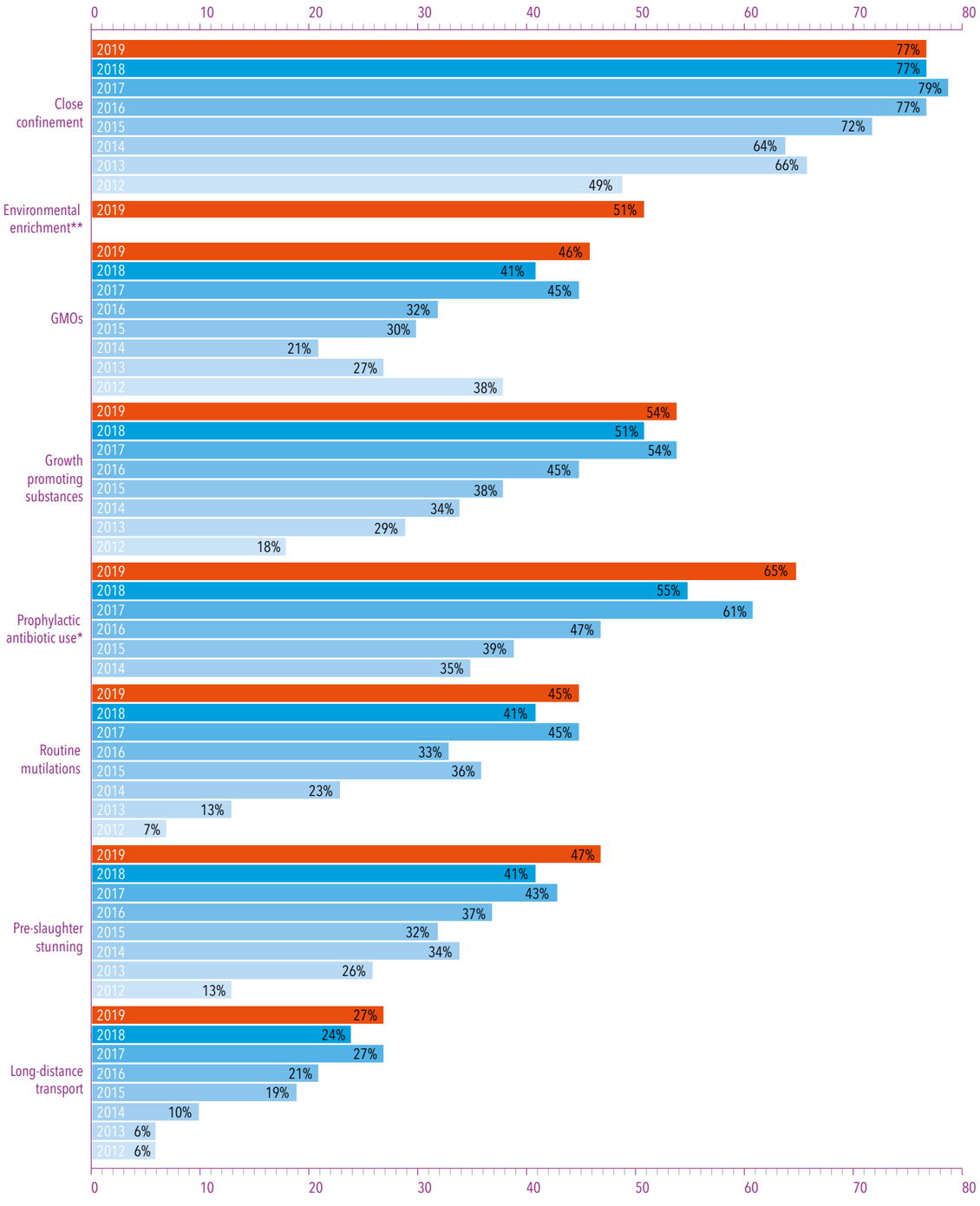
Similar to the trend in company commitments to the avoidance of close confinement, we are seeing many of the commitments to the reduction or avoidance of routine antibiotics (see Figure 2.15). For example, 97 companies (65%) have made commitments to the reduction or avoidance of routine antibiotics. Of these, 42 companies (28%) have made defined commitments in one or more key geographies (typically in North America and/or in Europe) and covering specific species and/or specific products, and 22 companies (15%) have made universal commitments covering all relevant geographies, species and products.

We are seeing similarly strong trends in company commitments to other key welfare issues, indicating that companies are continuing to strengthen their management commitments to addressing key welfare issues. For example, 54% of companies have made public commitments to the avoidance of growth promoting substances (see Figure 2.15), 51% have made public commitments to provide species-specific environmental enrichment*, and 47% have made public commitments to the avoidance of animals that have not been stunned prior to slaughter.

*The 2019 Benchmark included a new question[6] relating to the provision of species-specific environmental enrichment (e.g. brushes for dairy cows, manipulable materials such as straw for pigs, pecking and dustbathing substrates and perches for chickens). Its inclusion in the Benchmark reflects the increasing need for companies to provide stimulating environments for animals that also allow for positive experiences, rather than a focus on the avoidance of negative experiences. Companies are expected to provide animals with stimulating and complex environments that enable species-specific behaviours. It is known that a lot of welfare issues can be avoided when boredom and frustration is diminished and when animals are allowed opportunities to express natural behavioural needs.

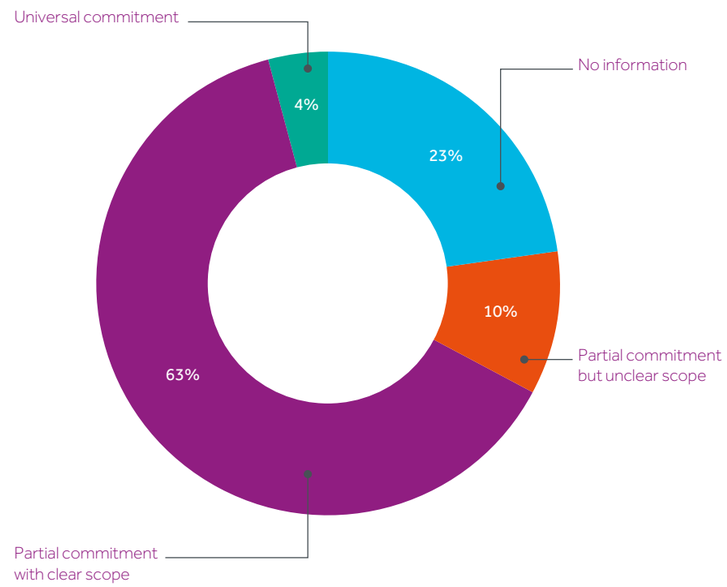
The 2019 findings indicate that 77 companies (51%) have published a commitment to provide environmental enrichment for animals, with most companies limiting their commitments to specified geographies, species and products. Only four companies[7] have published universal commitments to the provision of environmental enrichment.

Figure 2.10: Percentage of companies with specific policies on farm animal welfare issues



*Reported for the first time in 2014
**Reported for the first time in 2019

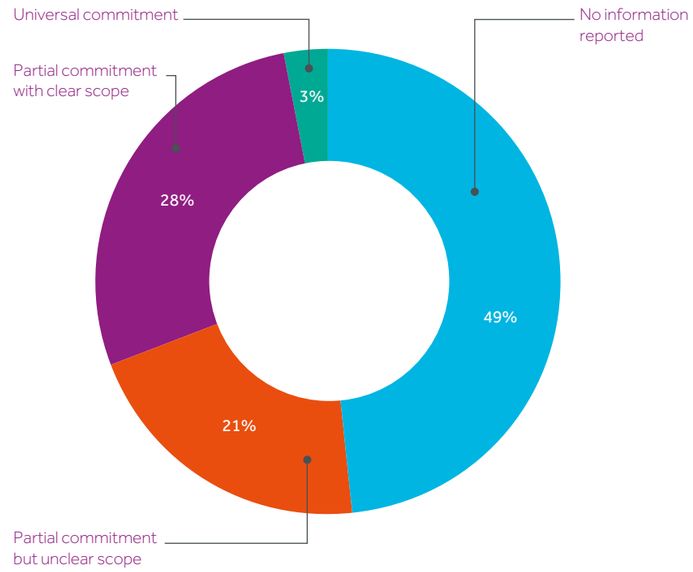
Figure 2.11: Commitment to the avoidance of close confinement*



*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, 116 companies (77%) have made commitments, typically in North America and/or in Europe. While only six (4%) of the 150 companies have made universal commitments to the avoidance of close confinement (covering all relevant species, geographies and products)[8], some 95 companies (63%) have specific, clearly defined commitments relating to key geographies, species and/or products.

Figure 12: Commitment to environmental enrichment*



*Figures founded to the nearest full percentage point.

Figure 2.13: Commitment to the avoidance of growth promoting substances

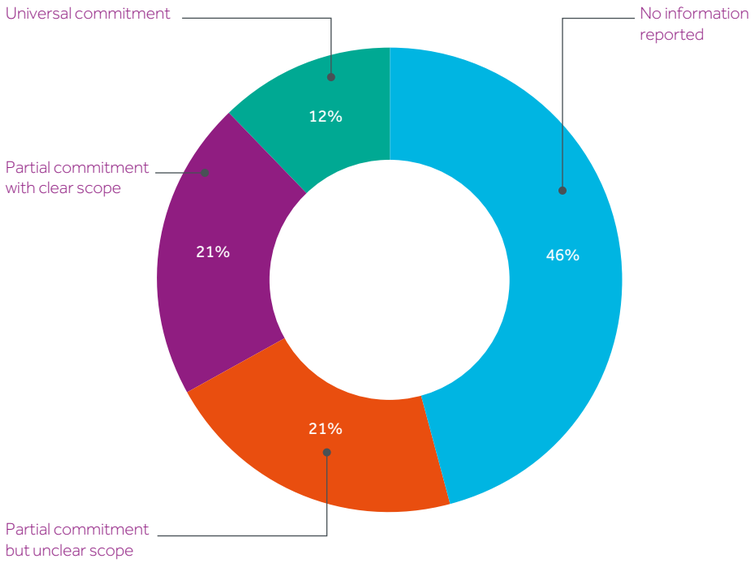


Figure 2.14: Commitment to avoid GMO/cloned animals

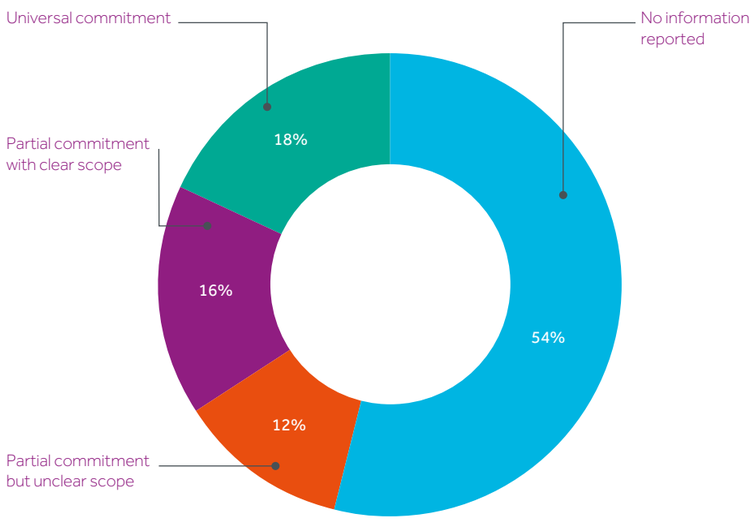
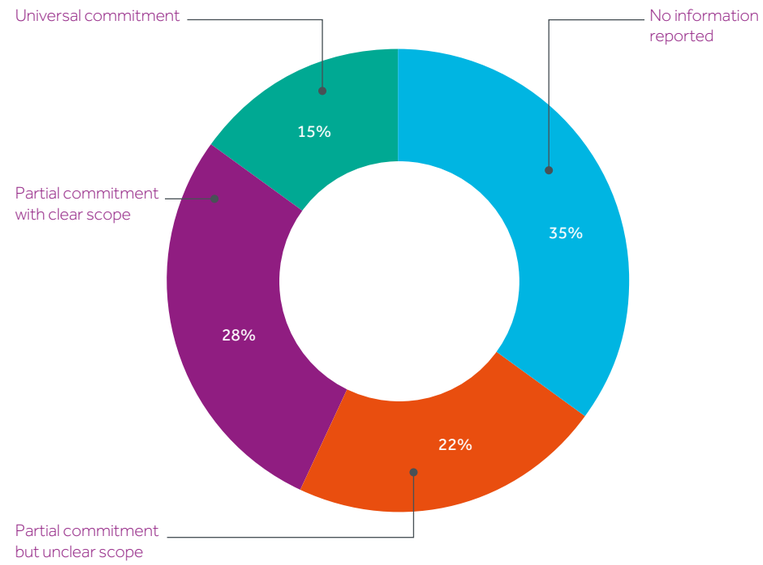


Figure 2.15: Commitment to the reduction or avoidance of antibiotics



*Figures rounded to the nearest full percentage point.

Figure 2.16: Commitment to pre-slaughter stunning

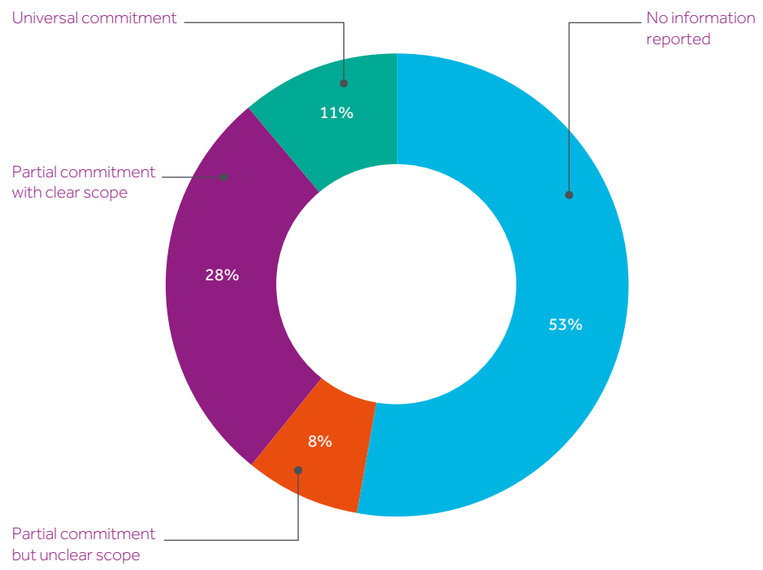


Figure 2.17: Commitment to the avoidance of long-distance transportation

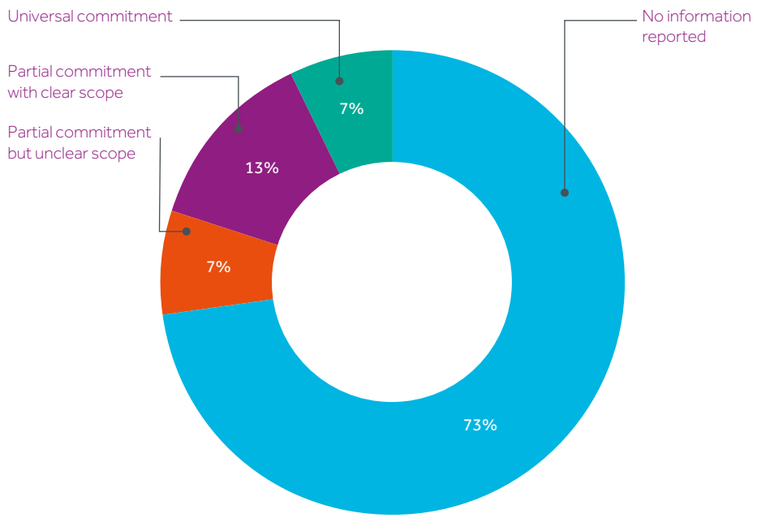
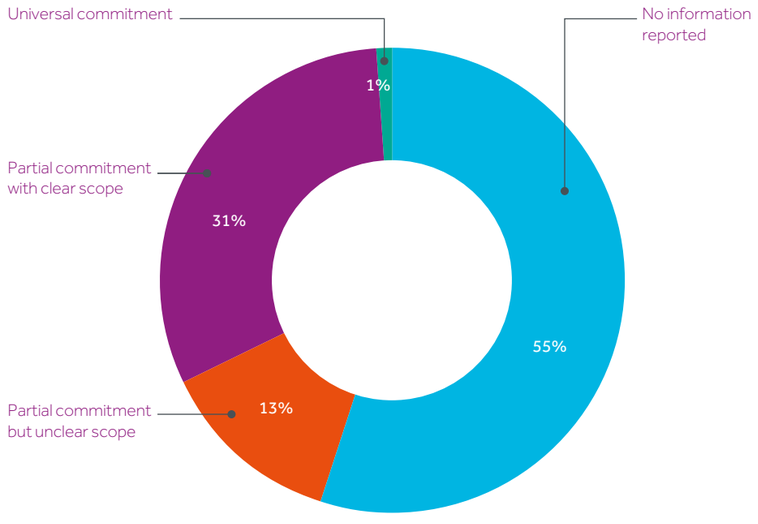


Figure 2.18: Commitment to the avoidance of routine mutilations



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

Mitchells & Butlers Welfare statements relating to laying hens

- "It is Mitchells & Butlers policy that all products that contain shell egg, egg products and products with egg as a main ingredient (such as Mayonnaise, Hollandaise Sauce, Quiches, Cheesecake, Scrambled egg, etc) shall be sourced from hens that have been reared in accordance to the requirements of Directive 1999/74/EC Welfare of Laying Hens for the protection of laying hens
- Mitchells & Butlers have extended their procurement of 100% shell on eggs from cage free hens, to include all egg products and egg ingredients and will complete this transition to cage free production by 2025, subject to availability and commercial negotiations
- All shell on eggs, egg products and products with egg as a main ingredient must be sourced, as a minimum requirement, from laying hens kept in enriched cages, where laying hens have at least 750 cm^2 of cage area per hen, of which 600 cm^2 is useable.
- All hens must be provided with a nesting area and at least 15 cm of perch per hen, with litter provided and unrestricted access to a feed trough
- The use of non-enriched (barren) cages in the production of shell on eggs, egg products and products with egg as a main ingredient is prohibited
- All egg production units must be registered with the relevant local authorities and have a distinguishing number which can be used to trace eggs back to their farm of origin. Mitchells & Butlers are working with suppliers to progress towards achieving a Sourcing Policy for Laying Hens whereby all products containing eggs and egg derivatives are sourced from hens that have not been kept in cages. This would require the procurement of egg derivatives such as dried egg white, powdered egg, dehydrated egg, egg solids and albumen etc. to come from hens kept in barns or free-range production systems
- In addition our Harvester restaurants work in partnership with the British Hen Welfare Trust."

https://www.mbplc.com/responsibility/goodfood/overarchingpolicy/specieswelfarestatements/

IKEA Food Better Chicken Programme Roadmap for North America, Europe and Asia Pacific

<table>
<tr><th></th><th colspan="3">Regions*</th></tr>
<tr><th></th><th>North America</th><th>Europe</th><th>Asia Pacific</th></tr>
<tr><td>Stocking density (30 kg/m²)</td><td rowspan="8">2020</td><td rowspan="8">2020</td><td rowspan="7">2020</td></tr>
<tr><td>Lighting</td></tr>
<tr><td>Flock health plan</td></tr>
<tr><td>No routine use of antibiotics</td></tr>
<tr><td>Environmental enrichment</td></tr>
<tr><td>Environmental conditions</td></tr>
<tr><td>Manure management plan</td></tr>
<tr><td>Non-deforestation feed</td><td rowspan="2">2025</td></tr>
<tr><td>Phase out highest priority antibiotics</td><td rowspan="4">2025</td><td rowspan="4">2025</td></tr>
<tr><td>Natural light</td><td rowspan="3">Further analysis required</td></tr>
<tr><td>Breed</td></tr>
<tr><td>Slaughter & transport</td></tr>
</table>

* "IKEA Food operates in additional regions, and we expect them to be compliant with the Better Programmes by 2025. However, the initial focus is on the largest regions North America, Europe, and Asia Pacific — learnings will be used as input for implementation in the remaining regions. Further analysis is required with our suppliers in Asia Pacific."

https://www.ikea.com/ms/en_JP/this-is-ikea/additional_information/better-chicken/index.html

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

Mowi Salmon Welfare Policy
"Mowi's commitment to securing optimal health and welfare in salmon production is underpinned by the application of good husbandry and management practices, biosecurity programmes and veterinary health plans, all under the supervision of our fish health professionals.

The aquaculture company stocks salmon at densities that safeguard their welfare and enhance performance. Maximum stocking densities at sea of 25 kg/m^3 ensure that the fish have ample space to swim, with the net pens containing a minimum 97.5% water and only 2.5% fish at the end of the farming cycle.

Mowi vaccinates 100% of fish to reduce the risk of disease and compromised welfare and its breeding programme focuses on improving survival and disease resistance. The company does not produce or sell transgenic salmon.

In cases of disease outbreaks and the need of medicinal treatment to safeguard fish welfare, all treatments are prescribed by certified veterinarians/fish health professionals and are strictly controlled by the authorities. Whenever possible, a sensitivity test is performed prior to any antibiotic treatment to avoid further antibiotic resistance. When antibiotics are used, the withdrawal periods are always respected prior to harvest to ensure no antibiotic residues are found in final products."

https://mowi.com/wp-content/uploads/2019/04/Mowi-Salmon-Welfare-Policy.pdf

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Woolworths Antimicrobial Stewardship Policy
"Woolworths recognises the importance of antibiotics in human and animal medicine and the risks associated with their improper use. Producers are encouraged to optimise welfare, health, hygiene, husbandry and biosecurity of animals and avoid the need to use antibiotic treatment unless the welfare of an animal is compromised. Veterinary medicines, including antibiotics are only used under veterinary guidance.

Woolworths works in collaboration with industry to ensure a collaborative approach to antimicrobial stewardship. The program uses the '5 R' approach of Responsibility, Reduction, Refinement, Replacement and Review to take a judicious approach to antibiotic usage.

Approach

Responsibility
Woolworths supports and encourages industry best practice guidelines and initiatives around responsible antimicrobial stewardship within its supply chains. Suppliers are expected and encouraged to use antibiotics responsibly, and farms are encouraged to have antimicrobial stewardship and herd health plans in place.

Reduce
Woolworths seeks to reduce where possible the use of medically important antibiotics and in particular for routine and prophylactic use.

Refine
Woolworths is working with its suppliers to ensure that when its livestock animals require treatment, the correct drug and dosing regime is correctly given only to those animals requiring treatment.

Replace
Woolworths works with and supports industry to reduce the overall need to use antibiotics. It works with suppliers to reduce the need for antibiotics through improved animal welfare and reviewing alternatives to antibiotics such as vaccines, supplements and probiotics.

Review
Woolworths ensures that there is continuous review and assessment of practices."

https://www.woolworthsgroup.com.au/page/community-and-responsibility/group-responsibility/responsible-sourcing/Animal_Welfare

Governance and management

In the early years of the Benchmark, we saw companies making high-level policy commitments on farm animal welfare but not explaining how these policy commitments were being translated into action. This raised questions about the level of commitment companies had towards farm animal welfare, and whether investors and other stakeholders could rely on these policy commitments as evidence that companies were actually committed to action and whether they were managing the business risks associated with farm animal welfare.

This is starting to change. Reflecting a trend we have seen in more recent iterations of the Benchmark, approximately half of the companies covered by the Benchmark are now providing evidence that they have established farm animal welfare management systems and processes. For example:

- 88 out of the 150 companies (59%) report some information on responsibilities, at either or both a senior management and/or an operational level, for farm animal welfare.
- 112 companies (75%) have now set farm animal welfare-related objectives and targets.
- 75 companies (50%) report that they include farm animal welfare in supplier contracts.
- 94 companies (63%) describe how they monitor and audit the farm animal welfare performance of their suppliers.
- 64 companies (43%) report on providing animal welfare training to their employees, and 63 (42%) report on having internal controls for managing non-compliance with their farm animal welfare policies.

75%
of global food companies have set farm animal welfare-related objectives and targets

Box 2.3: Examples of company approaches to farm animal welfare governance

Costco Animal Welfare Task Force
"Costco's Animal Welfare Task Force is made up of members from fresh meat buying, corporate and regional buying, animal welfare auditing, and global food safety. This past year the Animal Welfare Task Force worked on the following areas:

- Continuing to identify key global target goals and exploring practical implementation procedures through harmonization with global animal welfare laws and regulations.
- Continuing to benchmark with other industry groups to review best practices.
- Participating on the Coalition for Responsible Antibiotic Use being led by the Center for Food Integrity.
- Reviewing each animal welfare incident involving any Costco supplier. Audits of these facilities are immediately conducted and all supplier corrective actions are reviewed by the Animal Welfare Task Force and actions are taken accordingly."

https://www.costco.com/sustainability-animal-welfare.html

Danish Crown's Management of Animal Welfare
"Danish Crown is committed to ensuring that across the group all supplying farms and processing sites comply with legislative standards. Furthermore, the company's Danish, UK, Swedish and German supply chains must be sourced from producers that are accredited to recognised animal welfare schemes including Danish Product Standard, Danish UK Contract, Red Tractor, RSPCA Assured and QS.

As stated on the company website, "Dedicated Agriculture Supply Chain teams work closely with colleagues within the businesses and with farmers, industry organisations and customers to ensure that proscribed welfare standards are maintained and, wherever possible, improved. Our animal welfare requirements are clearly set out in supplier contracts according to specific market demands.

In each of our markets, the Agriculture Team led by the Agriculture Director is responsible for:

- Establishing, communicating and monitoring animal health and welfare standards
- Managing and monitoring independent third-party audit programmes
- Provision of information to the Management Board in the country in which they operate

A global committee comprising senior executives from across the group oversees the development of overall welfare policies. Information will also be reported periodically to the group Management Board.

In each market, they are supported by dedicated teams including animal health and welfare and food safety specialists who work with our supply chains, customers and industry organisations to ensure that proscribed standards are consistently implemented.

Processes are in place to review audit reports from farm animal welfare accreditation schemes and from client audit visits. In the event of a non-conformance, and as set out in the Supplier Code of Conduct, the issue will be investigated, and corrective actions taken where required within an agreed timescale. Periodic review of reports is carried out to identify any structural challenges that may need communication to our supply chains.

One of the benefits of our global operations is the facilitation of knowledge transfer across the business to the benefit of all. For example, the learnings from our UK business and their engagement with Bristol University has guided the training of our animal welfare officers at our processing operations in Denmark.

Having direct interests in different markets also places additional challenges on the business. Our Sokolow business was only acquired in 2014, and its integration is a wide-ranging task. In the area of animal welfare, a project was started to establish a focused animal welfare department and the plans also include the development of a business-specific animal welfare policy."

https://www.danishcrown.com/media/2880/danish-crown-group-animal-welfare-policy.pdf

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Perdue Farms

The company's 2019 Company Stewardship Report (p23) states "At our Research Farm, we're learning about different chicken breeds and studying the effects of brighter light, more space, outdoor access and enrichments – all part of our continuous improvement in poultry care."

Its Animal Care Report 2019 demonstrates commitment to research and innovation across key chicken welfare areas. Perdue Farms also hosts an annual Animal Care Summit, bringing together animal care experts and advocates, customers, farmers, and company leadership.

The company has introduced various financial incentives to ensure that broiler farmer income is not negatively impacted by the implementation of higher welfare measures, such as incentivising live bird-handling and rewards for welfare outcomes in addition to productivity.

https://corporate.perduefarms.com/pdfs/perdue_animal_care_report_2019.pdf

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Maple Leaf Food's Approach to Animal Care Governance

"**Culture**

- Providing our people with the knowledge, skills, resources and workplace culture to reinforce empathy and high standards of animal care.
- Clearly defining and enforcing expectations of our people and suppliers regarding animal care, recognizing best practices and taking swift disciplinary action when necessary.
- Elevating the importance and prominence of animal care in our management processes, operating policies and procedures, employee communications and supplier relations.

Accountability

- Establishing strong governance, with senior leaders directly accountable for compliance with our standards and advancing our goals.
- Reporting quarterly to a Committee of the Board and senior leadership on key animal care metrics, risks and progress toward our goals.
- Requiring our hog and poultry operations and suppliers to adhere, at a minimum, to guidelines under the National Farm Animal Care Council's Codes of Practice; the Canadian Quality Assurance Program and Animal Care Assessment Program of the Canadian Pork Council; the Animal Care Program of Chicken Farmers of Canada; the Turkey Farmers of Canada Flock Care Program©; the Canadian Hatching Egg Producers CHEQTM Program; and the Chicken Farmers of Ontario Transportation and Safe Handling Program.
- Requiring weekly/monthly internal audits of our operations by employees that are either certified or trained as animal auditors by the Professional Animal Auditor Certification Organization (PAACO), and annual third-party audits across our operations.
- Maintaining a strong and open relationship with the dedicated Canadian Food Inspection Agency (CFIA) inspectors and veterinarians at all our processing facilities, and with provincial officials that oversee on-farm animal care."

Our Better Care goals and performance

2018 PRIORITIES	STATUS	OUR PERFORMANCE
Continue to transition all Maple Leaf Foods sows to open housing by the end of 2021.	→	We completed our conversion of 44,000 sows to advanced open sow housing. We are on track to transition 66,000 by the end of 2021.
Pilot initiatives to promote play and reduce boredom in sow barns.	→	We piloted enrichment in all types of Maple Leaf Foods barns. Sow barn trials are still ongoing.
Pilot enrichment in Maple Leaf Foods poultry broiler barns and engage an independent producer on enrichment pilots.	→	Multiple trials were completed in conjunction with genetic evaluation, and more trials are planned for 2019.
Implement our poultry transportation strategy.	→	We hired four new on-farm resources to conduct pre-loading animal welfare assessments and launched our digital transportation monitoring system in two of our sites.
Develop and implement two additional modules of animal care training in 2018, including Animal Care 101 and Animal Care Foundations training modules for all Maple Leaf Foods employees who affect the lives of animals.	✓	Our Animal Care 101 training module has been developed but was not fully delivered in 2018. Our Animal Care Foundations training module was completed and piloted in 2018, but was only partially rolled out.
Provide enrichment and toys in all nursery and growing pig barns.	→	We have researched and sourced toys for all our nursery and growing pigs and will implement them in 2019.

2019 PRIORITIES
• Continue to transition all Maple Leaf Foods sows to advanced open sow housing by the end of 2021.
• Continue to pilot initiatives to promote play and reduce boredom in sow barns.
• Continue to pilot enrichment in broiler chicken barns and engage independent producers on enrichment pilots.
• Roll out our digital transportation monitoring system by the end of 2019.
• Deliver our Animal Care training modules by the end of 2019.
• Start and complete installation and implementation of enrichment and toys in all nursery and growing pig barns in 2019.

✓ Achieved ✓ Partially Achieved → On Track ⊖ Did Not Meet

https://www.mapleleaffoods.com/wp-content/uploads/2019/08/Maple-Leaf-Foods-2018-Sustainability-Report.pdf

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Cargill's Supplier Code of Conduct

"All suppliers globally are required to follow the Supplier Code of Conduct as part of their contracts. It includes reference online to our policies on animal welfare. Many of our supplier contracts also contain specific provisions related to animal welfare. If animal mistreatment or abuse is discovered in any supplier's operations, we investigate immediately and take actions that can include terminating contracts or legal action.

In addition to the many examples of efforts to drive progress in our supply chains listed elsewhere on this page, others include:

- We communicate our animal welfare policies to all employees and suppliers who handle farm animals in our supply chain. Cargill is held accountable for our animal welfare policies through internal and external third-party audits.
- We have an external advisory council for our turkey business, and our guidelines for our contract growers are based on the National Turkey Federation's guidance, with oversight from our welfare committee made up of external and internal experts. We educate and certify all of our contract growers on how to properly handle their turkeys through a program developed in partnership with academic experts. Our turkey business also runs programs to educate employees, truck drivers and first responders on animal handling in the case of emergencies.
- In Canada, Cargill conducts CowSignals training programs for dairy farmers to help them analyze environmental and health factors that affect their cows' comfort, milk production and longevity. Since 2013, groups of local farmers have participated in more than 175 sessions including insights about topics ranging from stall spacing and animal bedding to hoof trimming and nutrition."

https://www.cargill.com/page/bbfaw

Box 2.4: Examples of corporate objectives and targets linked to farm animal welfare

FrieslandCampina Working Toward Sustainable Dairy Production
"FrieslandCampina is working on reducing the ecological footprint of the dairy farming sector, retaining pasture grazing, continuously improving animal health and animal welfare, and preserving biodiversity. The aim is to reduce the use of scarce natural resources such as water, raw materials and fossil fuels. FrieslandCampina aims to keep the emission of greenhouse gases in 2020 equal to 2010 levels. This also applies in case of an increase in milk production. This includes the greenhouse gases released at member dairy farms, during transport from the farm to production facilities and when the dairy is processed at the production facilities.

The Company encourages member dairy farmers to start working with the Biodiversity Monitor's climate, life cycle management and nature indicators on their farm, and also encourages pasture grazing. Its 2020 Sustainability Targets include achieving 81.2 percent (partial) pasture grazing

Dairy farmers applying pasture grazing receive a 1.50 euro meadow milk premium per 100 kilos of milk for 2018. An amount of 1.00 euro per 100 kilos of meadow milk is paid from the operating profit. On average, on all FrieslandCampina member milk, this amounted to 0.63 euro per 100 kilos of milk. Furthermore, another 0.50 euro per 100 kilos of meadow milk is paid out pursuant to cooperative schemes. To finance this amount, 0.35 euro per 100 kilos of milk is withheld from all milk. This also pays for the partial pasture grazing premium."

https://www.frieslandcampina.com/app/uploads/sites/2/2019/02/Annual-Report-2018-FrieslandCampina-NV-WEB.pdf

Advancing farm animal welfare in the food 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. Many companies – 55 of the 150 companies (37%) – talk about this research as part of their reporting on farm animal welfare.
For example:

- Kaufland's Chicken and Rooster initiative supports farmers from Baden-Württemberg and Bavaria to rear male chicks from laying hen breeds. The company has set itself the goal of enabling the male chicks in the laying hen industry to live longer: the costs for rearing the males will be borne by the sale of the chicken meat and by a price premium for the eggs of the associated hens. Eggs from this project will be sold in more than 200 Kaufland stores. A similar initiative in Mecklenburg-Western Pomerania, Berlin and Brandenburg, commits the company to selling the resulting products in over 70 stores.
- Jerónimo Martins Agribusiness (JMA), a company of the Jerónimo Martins Group, signed a cooperation agreement with the University of Évora for the development of research activities and to support education. Under this agreement, several theory-practical, theory-scientific and research activities, addressing animal welfare and animal nutrition, will be implemented in JMA's business areas and at its three subsidiaries, which operate in the animal husbandry, aquaculture and dairy sectors.
- In FY2019, Saputo announced a new partnership with the Iowa State University's College of Veterinary Medicine, contributing CDN$100,000 over the next two years to the development of benchmarking and training materials in dairy goat care and handling, as well as producer outreach workshops. This is in addition to our existing partnerships with the University of Guelph and the University of Wisconsin, representing a total investment of CDN$250,000 in FY2019.
- 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.

Alongside investment in research and development, it is necessary to have 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 in collaboration with their supply chain partners as well as other companies, industry bodies, policy makers and specialist advisors to create the right conditions for change.

Companies are starting to collaborate with relevant trade associations and with other groups to raise the profile of farm animal welfare issues, to build understanding inside the food industry and externally, and to influence public policy and legislation. Sixty-four (43%) 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 2.5: Examples of company initiatives aimed at advancing farm animal welfare in the industry

Carrefour collaborating on a common reference framework to evaluate animal welfare
French supermarket, Carrefour, is participating in a project with Laboratoire d'Innovation Territorial LIT Ouesterel. The consortium of private and public actors aims to advance livestock rearing to meet societal expectations on animal welfare and the use of antibiotics. The association will first build a common benchmark for assessing animal welfare.

The company is also conducting a study tour on cage-free production. In partnership with Humane Society International (HSI), Carrefour ran an international study tour on cage-free egg production for its suppliers, its own and other retailers' personnel, experts and government representatives. The 50 participants from ten countries discussed cage-free alternative farming solutions and technical and regulatory issues and worked on promoting a coalition on alternative egg production methods.

http://www.carrefour.com/sites/default/files/politique_bea_groupe_carrefour.pdf

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Perdue Farms
The company's 2019 Company Stewardship Report (p23) states "At our Research Farm, we're learning about different chicken breeds and studying the effects of brighter light, more space, outdoor access and enrichments – all part of our continuous improvement in poultry care."

Its Animal Care Report 2019 demonstrates commitment to research and innovation across key chicken welfare areas. For example, the company has made a commitment to install controlled atmosphere stunning (CAS) equipment in its poultry harvest facilities, which it has started implementing. Perdue Farms also hosts an annual Animal Care Summit, bringing together animal care experts and advocates, customers, farmers, and company leadership.

The company has introduced various financial incentives to ensure that broiler farmer income is not negatively impacted by the implementation of higher welfare measures, such as incentivising live bird-handling and rewards for welfare outcomes in addition to productivity.

https://corporate.perduefarms.com/pdfs/perdue_animal_care_report_2019.pdf

Tesco Offers Fair for Farmers Guarantee

"Tesco's fresh milk is produced from cows on farms that are part of our Tesco Sustainable Dairy Group (TSDG) and covered by our Fair for Farmers Guarantee. Nearly 730 farms are needed to produce the fresh milk for our Tesco stores; with the herd size varying from small 60 cow herds to larger herds across the country. Each farm manages their production system to suit the geography and climate from South East England to Wales and Scotland. All our TSDG dairy farms in addition to the Red Tractor assurance meet our specific Tesco Livestock Requirements. We have clear welfare measures for cow body condition, antibiotic usage, calving success, record keeping and more. We set targets for improvement each year, and monitor important areas such as lameness, cleanliness and cow health in each farm. This allows TSDG farmers to benchmark their performance with the rest of the group and allows us to target any help and resources to the areas where farmers need it most. To make sure our suppliers are always striving to meet our requirements our TSDG farms are visited every year by an independent auditor.

Since 2008 we have worked with Liverpool University's Tesco Dairy Centre of Excellence at Wood Park, Neston. Our TSDG farmers and the wider industry have benefited from trials on bedding, mobility, fertility and other research and sharing of best practice.

Calves produced on TSDG dairy farms are not allowed to be live exported, except for breeding purposes. We discourage the use of antibiotics to prevent disease and since 2008 we have been encouraging our TSDG to minimise the use of antibiotics important for human health in cows and calves. Current areas of focus for us include work to drive out Johnes from our TSDG herd, promoting high standards in biosecurity with our satellite best practice dairy unit at South West England agricultural college and the introduction of a scorecard to measure both efficiency and health and wellbeing of our Tesco TSDG farms. We are working with vets to strengthen how we can support them in a preventative medicine approach and to reduce further the antibiotic use on TSDG farms."

https://www.tescoplc.com/sustainability/downloads/animal-welfare-policy-group/more-information-on-our-uk-animal-welfare/

Colruyt - Born, reared and slaughtered in Belgium

"In mid-2018, we set up a 100% Belgian and organic pork chain; this is an innovative cooperation model with significant added value for all the links in the chain. The company BioVar.be deals with the rearing of organic pigs and has invested in brand new, modern pig sheds that meet the criteria for organic farming. The farm has about a hundred sows and the first piglets were born at the start of 2019. Our other partner company Delavi, deals with the transport arrangements, slaughter of the animals and cutting the meat into portions. Our part in the partnership is, on the one hand, our exclusive commitment to buy the pork. On the other hand, our skilled butchers take care of the next steps, such as cutting the meat into smaller portions and wrapping it up.

Together with the two partner companies, we control the entire chain and the cost structure. Thanks to this partnership, we can also contribute to the further development of organic farming in Flanders and help retain local expertise. Most importantly, all partners are responding to the growing demand for pork that is locally, sustainably and organically reared, thus reducing the amount that has to be imported."

https://www.colruytgroup.com/wps/portal/cg/en/home/stories/biologisch-belgisch-varkensvlees-bio?utm_source=issuu&utm_medium=folder&utm_campaign=cg_jaarverslag1819_2019_-_-&utm_content=been__-_-_28&utm_term=

Consumer engagement

Seventy-seven (51%) of the 150 companies assessed in the 2019 Benchmark provide information to their customers on farm animal welfare. However, much of this engagement is made by food retailers and producers and manufacturers, with limited examples from restaurants and bars. Companies are finding multiple ways to engage consumers through, for example, print, video and social media channels, as well as through on-pack labelling and point of sale information. This year, 41 companies presented multiple examples of their engagement with their customers, demonstrating 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 company approaches to corporate sustainability.

Box 2.6: Examples of companies communicating farm animal welfare to their customers

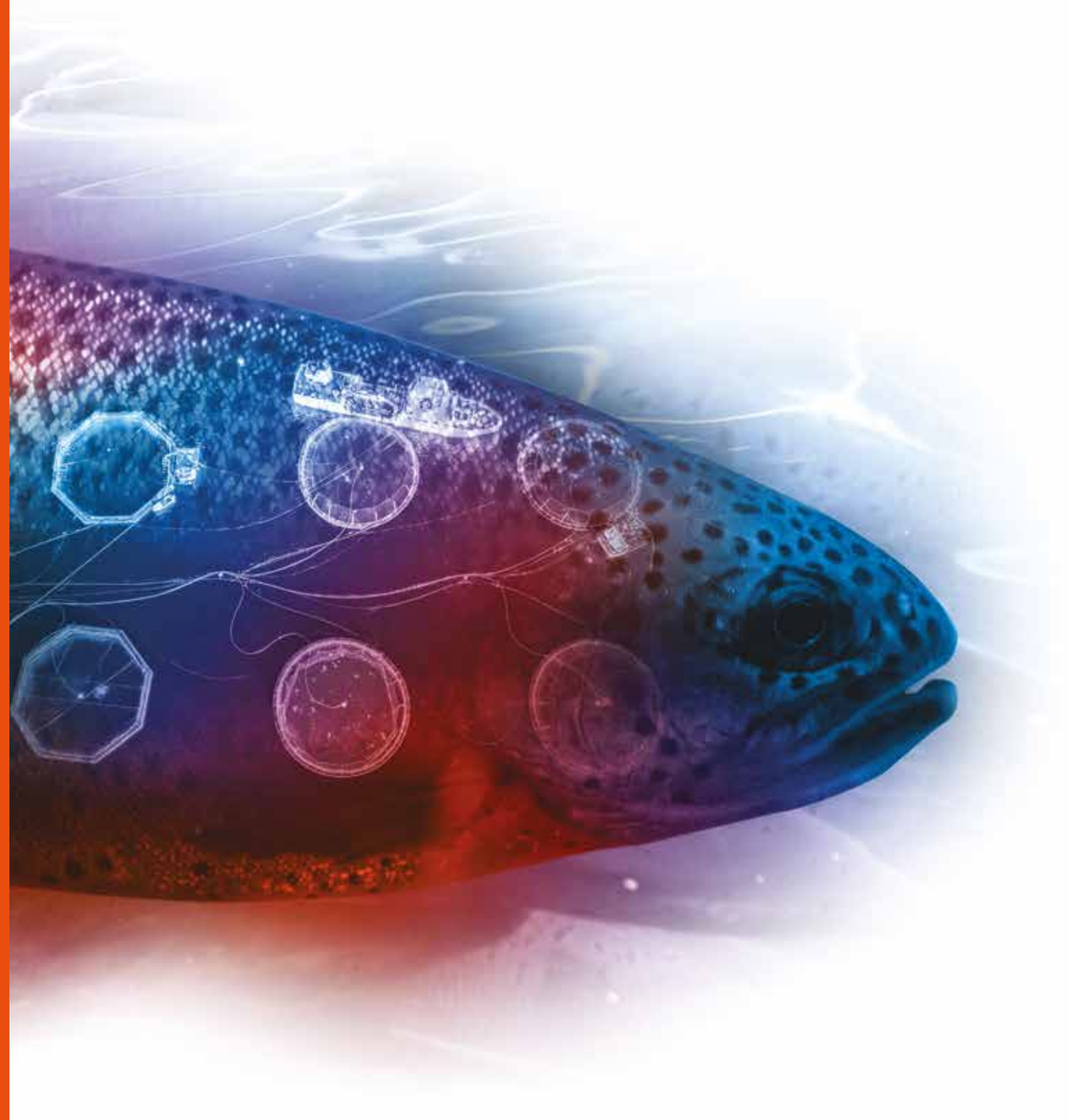
- **Lidl** believes that it is important to work with a range of production systems to meet its vision of 'making good food accessible to everyone'. The company's innovative Method of Production label, which is being trialled on all fresh chicken products nationwide from June 2019, appears on product packaging to help customers make informed purchasing decisions about the products they are buying. The label clearly explains the method of production used by farmers to rear the animals sold by Lidl, such as whether an indoor or outdoor farming system has been used. Working with trusted partners, such as Red Tractor and RSPCA Assured, Lidl customers can be reassured that the emotional and behavioural wellbeing of the animals in the company's supply chain are being measured, assessed and improved, regardless of the type of production system being used by its farmers. https://corporate.lidl.co.uk/sustainability/animal-welfare/mop-labelling

- **Migros** has developed an innovative labelling scheme that provides self-explanatory text elements and symbols on the products, which clearly show what is special about the product. This way customers can see how their purchase has a positive impact on animal welfare, people and the environment. https://generation-m.migros.ch/de/nachhaltig-leben/m-check.html

- **Waitrose** uses point-of-sale information, such as shelf barkers, to promote animal welfare awards. The company runs stories in its weekly newspaper, Waitrose Weekend, (circulation approx. 500,000) on animal welfare and also in its monthly magazine, Waitrose Food. A recent Waitrose & Partners marketing campaign featured the company's Agriculture and Aquaculture managers. https://www.waitrose.com/home/inspiration/about_waitrose/the_waitrose_way/waitrose_animal_welfarecommitments.html

"Sixty-four (43%) of the 150 companies covered by this year's Benchmark report that they are working with others to advance farm animal welfare"

3. In focus
Farm animal welfare performance



Farm animal welfare performance

The results of the 2019 Benchmark suggest that companies are paying increasing attention to performance monitoring and reporting.

However, whilst 104 companies (69%) now report at least some animal welfare performance data, the quality of data reporting is poor, with companies achieving an average score of just 15% in this section. Many companies are failing to provide complete data covering all relevant species, geographies and products covered by their operations and supply chains. The lack of complete reporting means that it is often not possible to accurately assess whether a company 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.

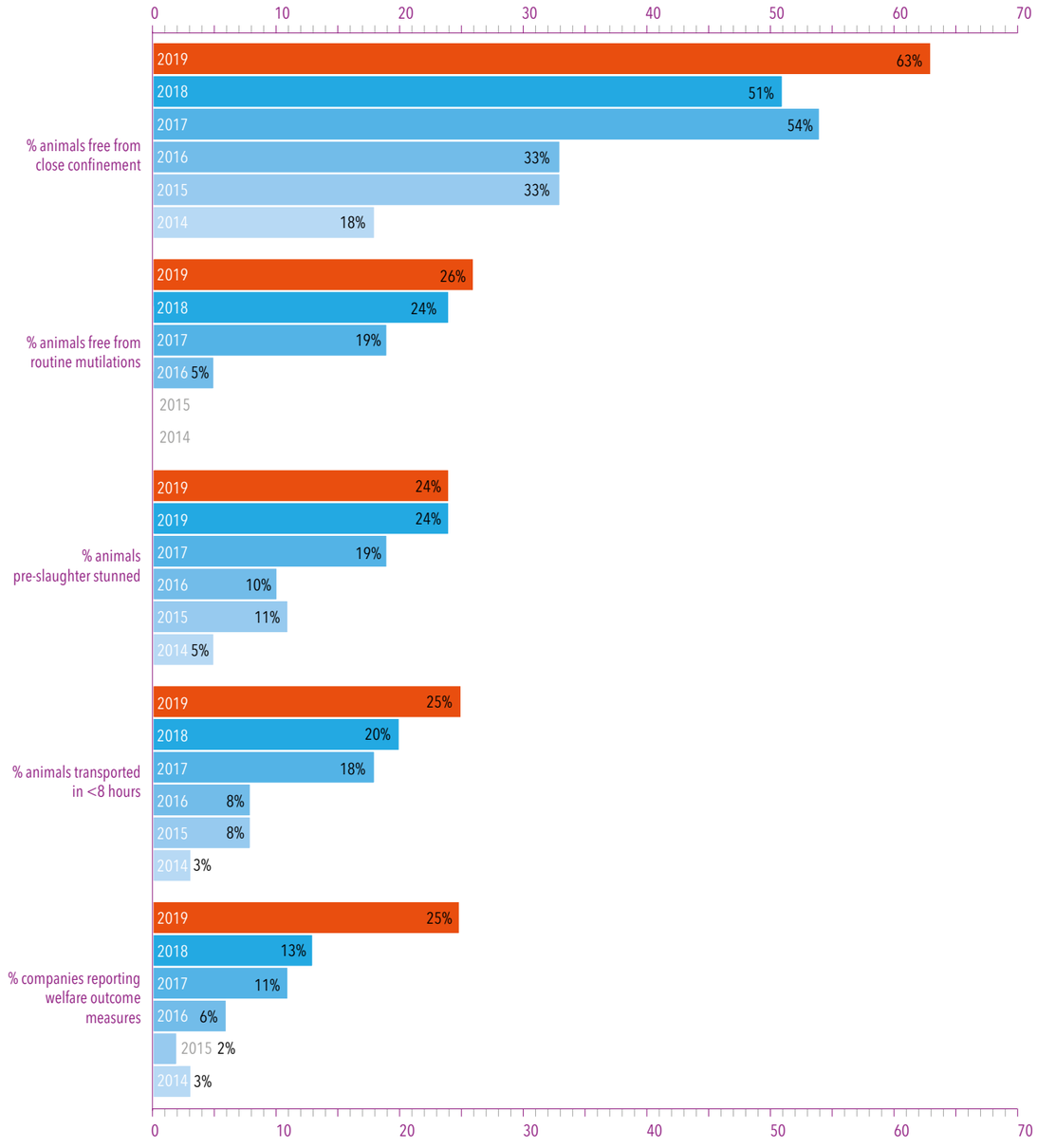
Performance disclosure

We assess whether companies – see Fig. 3.1 – disclose information about their performance in five specific areas - the avoidance of close confinement, the provision of species-specific environmental enrichment, the avoidance of routine mutilations, the requirement for and the effectiveness of pre-slaughter stunning, and long-distance live transportation. We also ask companies 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, such as the proportion of laying hens that is cage-free, or welfare indicator measures, such as mortality rates), 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.

In 2019, we introduced two new performance reporting questions. The first new question asked, 'Does the company report on the proportion of animals for own-brand products in its global supply chain that is provided with an enriched environment?'. This follows the addition this year in the Management Commitment and Performance section of the new policy question relating to environmental enrichment (see page 27). The second question asked, 'Does the company report on the proportion of animals in its global supply chain that is ineffectively stunned, i.e. are subject to back-up or repeat stunning?'. This responds to concerns raised during our 2019 consultation process about the need for companies to monitor the effectiveness of pre-slaughter stunning in addition to the occurrence of pre-slaughter stunning.

The results of the 2019 Benchmark demonstrate that, with the exception of reporting on animals free from close confinement where companies are making substantial progress, relatively few companies are making significant progress on farm animal welfare performance reporting (see Figure 3.1):

Figure 3.1: Performance reporting by companies 2014-2019



Note: Performance reporting questions have been introduced from 2014, with additional questions introduced in 2016, 2018 and 2019.

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, with 63% of companies covered by the 2019 Benchmark providing some information on the proportion of animals that are free from close confinement. This is an improvement on the 51% of companies reporting this information in 2018 and is significantly higher than the 33% reporting in 2016, and the 18% reporting in 2014 when this question was first asked.

Reporting on other aspects of performance remains relatively limited. Around one quarter of the companies covered by the Benchmark provide information on the proportion of animals that are free from routine mutilations, on the proportion of animals that are stunned prior to slaughter, and on maximum transport times. It is, however, relevant to note that the proportion of companies providing information in these areas has increased from one fifth in 2018.

Only 24 companies (16%) report on farm animal welfare outcomes. For example, companies have provided data on measures such as lameness rates in pigs; leg cull rates in broiler chickens; somatic cell count in dairy cattle; feather cover 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 and on the physical condition of animals and capture more data than they report publicly. Companies, however, are yet to report on outcomes that indicate the mental wellbeing or behavioural expression of animals, required for a good quality of life and high welfare status.

The data above also point to the critical role played by the BBFAW 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 global operations and supply chains achieving specific welfare outcomes, nor do they provide sufficient information to enable a reasonable estimate to be made.

Performance impact

The BBFAW has always been clear about the need for the Benchmark 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. In recent years, we have gradually increased the emphasis on performance reporting and on welfare impact criteria, through introducing questions (first in 2014, then in 2016 and again in 2019) and also through increasing the weighting of the questions (in 2018 and in 2019).

Although the weighting of the Performance Reporting and Impact section remained at 35% in 2019, within this section the weighting of the 10[9] questions relating to welfare impacts have been adjusted upwards from 40% to 56% of points in this section. Across the Benchmark as a whole, the 8 performance reporting questions now account for 15% of a company's potential maximum score and the 10 welfare impact questions now account for 20% of a company's potential maximum score. We have achieved this by increasing the number of points for Qs 28-31[10] (Qs 27-30 in 2018) from 5 points in total in 2018 to 20 points in total in 2019, and through increasing the number of points for Qs 32-34[11] (Qs 31-33 in 2018) from 5 points in total in 2018 to 15 points in total in 2019. The new scoring for these questions is presented in Appendix 3.

These changes are 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.

Box 3.1: 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/m^2 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?
- What proportion of the company's supply of chicken meat (fresh/frozen/processed and ingredient) comes from strains of birds with improved welfare outcomes and with a slower growth potential (defined as <55g/d averaged over the growth cycle according to the breeding company specification)?

Almost two-thirds (63%) of the companies covered by the Benchmark score some points within the 10 performance impact questions, although in most instances the scoring relates to just one or two questions. Expressed another way, most companies do not provide 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 do not explain what proportion of global sales or volumes are represented by that country or product line.

However, there are signs that companies will report on their performance. For example:

- Seventy-five companies (55% of companies to which this question was applicable) report on the proportion of laying hens in their global supply chains that is free from close confinement (cage-free). Of these, 12 (8%) state that 100% of the laying hens in their supply chains are free from close confinement.

- Forty-three (31% of companies to which this question was applicable) report on the proportion of pigs in their global supply chains that is free from sow stalls/gestation crates, and eight 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.
- Twenty-two (16% of companies to which this question was applicable, compared to just 11% in 2018), report on the proportion of broiler chickens in their global supply chains that is reared at lower stocking densities (30 kg/m2 or less). However, of these, only three have more than half of the broiler chickens in their supply chains kept at or below this stocking density.

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 of 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 in their supply chain, 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.

While we note these practical challenges and concerns, we recognise that many have now been addressed. For example, BBFAW does now provide a core set of performance disclosure expectations that are relevant to all companies across all jurisdictions, many companies now report performance data, and companies – including all of those in at least Tier 4 of the Benchmark – should have established processes in place to at least start reporting on their performance. One of the consistent messages from the companies that do report is that performance reporting – even if it is incomplete – has been welcomed by their external stakeholders. While, of course, there is always pressure to improve, companies have signalled that their stakeholders (who include consumers, investors and non-governmental organisations) have been supportive of this reporting and have been understanding of the practical challenges faced by companies; even those whose performance falls below that which they would like to see.

In Box 3.4, we present several 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 3.2: Examples of company reporting on performance and impact

Danone

Danone's Animal Welfare Progress Report 2019 provides details on commitments and progress made for each species in the company's supply chain. The Report includes trend data since 2016, as well as commentary on the progress being made and any factors that may have hampered performance. For example, the company reports that it is making good progress on its 2020 target to provide 100% of calves with group housing and comfortable fibre bedding, with the proportion of calves increasing from 53% in 2016 to 88% in 2018. The company also reports that progress on its target to achieve 100% of eggs from cage-free hens globally has been hampered by the recent acquisition of a company in the US, which has led to the overall proportion of cage-free eggs and egg ingredients reducing from 43% in 2018 to 37% in 2019.

Wm Morrison

Morrison's Farm Animal Health & Welfare Report 2019 provides a detailed account of species-specific environmental enrichment. For example, "100% of birds [broiler chickens] had access to at least two forms of environmental enrichment, namely sawdust bales. Other additional enrichment objects being used include perches (available to 76%), platforms (available to 12%) and a variety of pecking objects (available to 88%), these included cables ties, bottle tops, chains and knotted string.

In 2018, 100% of laying hens had access to at least one form of environmental enrichment, namely perches. Examples of extra enrichment materials provided include hay nets (available to 35%), pecking blocks (available to 43%) and a variety of other pecking objects (available to 88%) including chains, cable ties, bottle tops, oyster shell and string. 100% of free-range hens had access to either woodland, trees or bushes, with over 55% of producers also introducing trailers or wooden shelters to the external ranging area.

Animals that have access to environmental enrichment materials if housed indoors:

100% - pigs for own brand pork

100% - broilers for own brand chicken

100% - laying hens for shell eggs

100% - cows for dairy if all year round housed.

https://www.morrisons-farming.com/globalassets/farming/how-we-work/fahw-report_final.pdf

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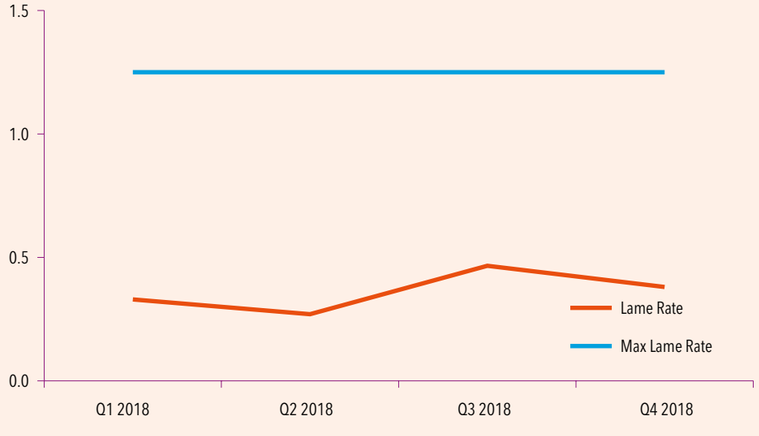
Greggs

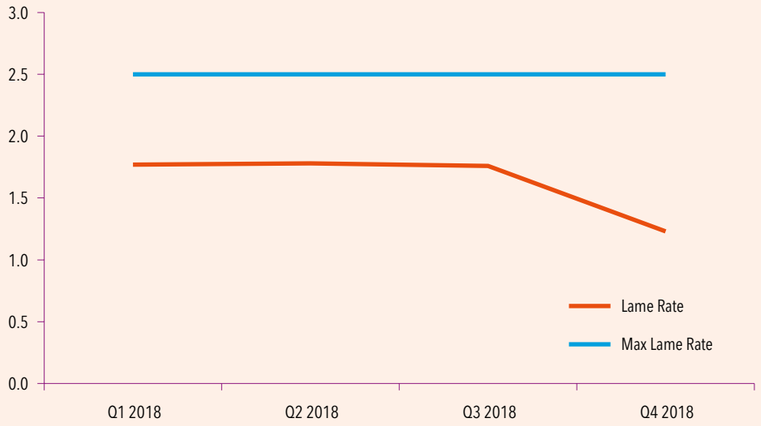
The Farm Animal Welfare Strategy (2019) reports on at least one welfare outcome measure per relevant species (pigs, cows, broilers, laying hens, turkeys, sheep) and charts progress across years.

Specific welfare outcome measures include lameness rates in pigs, beef cattle and sheep, post-mortem reject rate in turkeys, leg cull rate in broilers, somatic cell count in dairy cattle, and feather wear in laying hens. Greggs continues to work with suppliers to report the proportion of livestock that has been pre-slaughter stunned. The company has also updated its farm animal welfare questionnaire to capture detail on species-specific enrichment, and the requirement for back-up or repeat stunning as part of its 2020 farm animal welfare strategy.

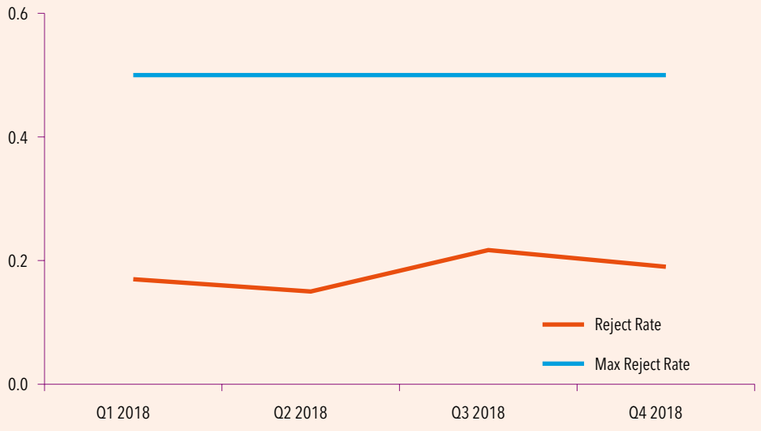
Lame rate: Pigs %



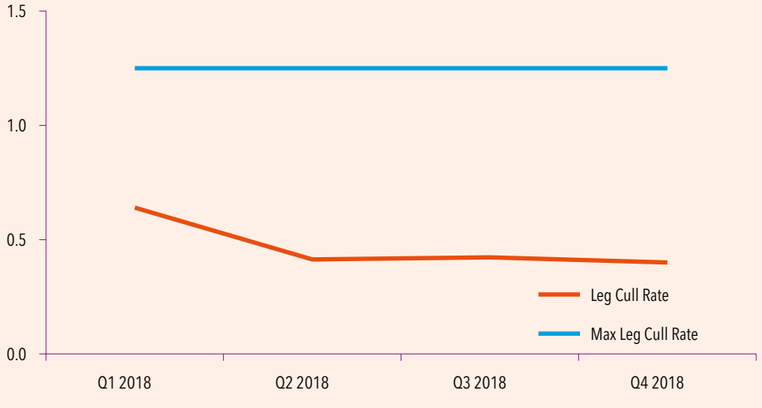
Lame rate: Beef cattle %



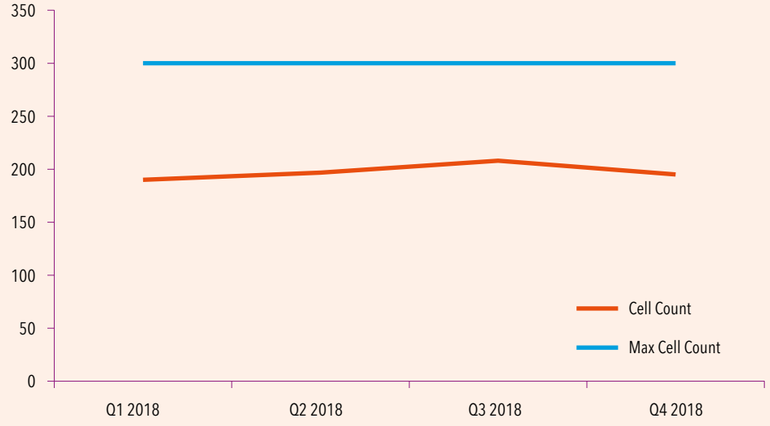
Post mortem reject rate: Turkeys %



Leg cull rate: Broilers %

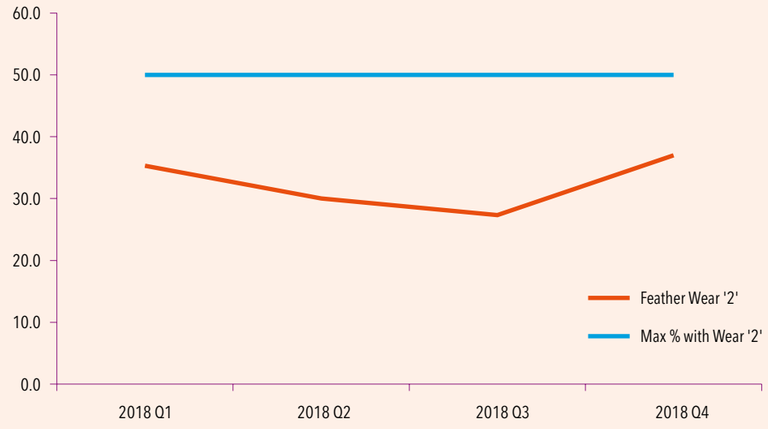


Somatic cell count: Dairy cattle



Somatic cell count x1000 per ml of milk.

Laying hens % with Assurewel '2' feather wear



https://corporate.greggs.co.uk/sites/default/files/FAW%20Strategy%202019%20-%20Published_0.pdf

"104 companies (69%) now report at least some animal welfare performance data, yet the quality of reporting remains poor with companies scoring 15% on average in this section."

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.

Our reflections on the current state of play

As already mentioned, the 2019 Benchmark reveals that the landscape of farm animal welfare is changing dramatically and at a faster pace than in previous years. This appears to be driven by consumer interest and growing acknowledgement of the business risks and opportunities associated with farm animal welfare.

Despite a tightening of scoring requirements, we have 22 companies that are considered to have integrated farm animal welfare into their business strategies (companies in Tiers 1 and 2), and 30 companies have moved up at least one tier in the Benchmark. The innovation and transparency demonstrated by top-performing companies in the Benchmark has been hugely impactful in influencing other companies to improve their management practices and processes and report their performance data. Indeed, we believe the capacity of the BBFAW to drive such influences has been key to the longer-term changes we are now seeing.

A majority of companies have now adopted formal farm animal welfare policies, assigned management responsibilities, set objectives and targets, and implemented supply chain processes to ensure that their policies are effectively implemented. 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 specialists, and educating consumers about higher animal welfare.

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companies have integrated farm animal welfare into their business strategies

Notwithstanding the significant progress we are seeing, the data also highlight the scale of the challenge. Fifty-eight companies remain in Tiers 5 and 6 and provide little or no information on their approach to farm animal welfare, and eight companies saw their year-on-year scores fall. This 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 have yet to see improvements in the quantity and quality of information being reported in this area and, as a consequence, the ability to assess the impact of companies' management systems and implementation of their policies is limited.

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 and governance 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.

The company and investor perspective

Company engagement is central to the Benchmark process. Each year, we, the BBFAW (i.e. the Secretariat and the BBFAW partners, Compassion in World Farming and World Animal Protection) engage directly with companies on their scores in the Benchmark (approximately 30% of the companies assessed each year comment on their draft assessments, with 29% commenting in 2019), 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. The BBFAW meets 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.

The BBFAW has a similar level of engagement with investors. We have worked closely with investors since 2011[12] 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.

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 4.1: Understanding investor influence on farm animal welfare

When BBFAW was first established, 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 30 investors with £2.3 trillion in assets under management[13] participate in the BBFAW-convened Global Investor Collaboration on Farm Animal Welfare. 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. 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. The BBFAW expects to see these efforts leading to substantial improvements in many of these companies' scores in future iterations of the Benchmark.

Box 4.2: Different perspectives on farm animal welfare[14]

In 2019, the Secretariat 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 continue - as we saw in 2018 - to be 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 'transition to cage-free eggs', 'onboarding suppliers and supplier engagement' and 'addressing antimicrobial 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 two most common answers were corporate policies on farm animal welfare (69% of respondents) and specific policies/positions on key animal welfare issues (62% of respondents). This was followed by reporting on farm animal welfare (54% of respondents), suggesting that while investors continue to prioritise policy commitments there is an increasing appetite to see evidence that companies are implementing and performing against their commitments to farm animal welfare.

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 79% of companies citing this, followed by farm animal welfare as a business risk and the Business Benchmark on Farm Animal Welfare (72%), and farm animal welfare as a business opportunity (62%).

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 (82%) and client demand (65%). 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. Consumer 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. Seventy-nine 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 interest 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 a possible conflict between higher animal welfare production and other sustainability issues (47% of respondents), and 'our suppliers/producers/business partners view their current animal welfare standards as acceptable' (43% of respondents).

Investors were asked to rate the significance of barriers to them paying more attention to animal welfare. Some 82% of respondents indicated that competing engagement priorities was the most significant barrier, followed by 76% seeing farm animal welfare as less significant than other ESG issues and 69% indicating a lack of clarity on the investment case for focusing on farm animal welfare.

How do we accelerate impact?

The BBFAW sees 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. The BBFAW will focus its efforts in the following areas:

1. The BBFAW 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. The BBFAW 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 South America and Asia.

3. The BBFAW will press companies to improve their practices and reporting on farm animal welfare. We will encourage investors and other stakeholders to support these efforts in their engagement with companies.

4. The BBFAW will build relationships with other stakeholders – in particular, intergovernmental agencies and standards bodies – to integrate our criteria into their lending and standards criteria.

5. The BBFAW will continue to develop country and market-specific benchmarks, starting with the BBFAW Nordic, which will launch in 2021.

6. The BBFAW will carefully monitor reporting on animal welfare performance and consult with companies and other stakeholders on the appropriateness of increasing the emphasis the BBFAW places through our scoring on animal welfare performance.

7. The BBFAW 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, the Secretariat 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).
Increased focus on positive affective states versus historical focus on avoiding negative affective states.
Expansion of industry engagement.
Biosecurity and security of supply.
Supply chain transparency.
Environmental enrichment across supply chain.
Fish welfare in aquaculture and in wild caught fish.
Broiler chicken welfare.
Humane transport and slaughter practices.
Gene editing to improve welfare.
Reporting on welfare outcome measures to raise consumer attention and knowledge.
Sustainable feed production.
Links between animal welfare and human and public health, including food safety and pandemics.
Clean food (i.e. food containing no additives and produced without antibiotics).
Food labelling.
Increased attention on plant-based protein and consumer moves away from animal protein.
Integrating animal welfare with climate and biodiversity topics.
Impact of trade deals on global supply chains and changes to animal welfare legislation.
Dehorning protocols and/or polled cattle use.
Avoiding mutilations in pigs.

Appendices

Appendix 1

2019 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
The company identified farm animal welfare 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
The company has a broad commitment to farm animal welfare in a policy statement (or equivalent) but no description of how the policy is to be implemented.	5
The company has a 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.

Geographic scope	
Not specified.	0
Scope is limited to certain specified geographies.	2
Scope is universal across all geographies.	5
Species scope	
Not specified.	0
Scope is limited to certain specified species.	2
Scope is universal across all relevant species.	5
Product scope	
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
A partial commitment to the avoidance of confinement but the scope (in terms of geography, species, products) is not clearly defined.	1
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
The company makes a 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 provision of effective species-specific environmental enrichment?

Companies are expected to provide animals with stimulating and complex environments that enable species-specific behaviours. Environmental enrichment should only be applied to situations where environmental modifications have enhanced the performance of strongly motivated species-specific behaviours or have led to the expression of a more complex behavioural repertoire. Examples can include (but are not limited to) brushes for dairy cows; manipulable materials such as straw for pigs; pecking and dustbathing substrates, and perches for chickens; bathing water for ducks.

No stated position.	0
The company makes a partial commitment to providing effective species-specific enriched environments but the scope (in terms of geography, species or products) is not clearly defined.	1
The company makes a partial commitment to providing effective species-specific enriched environments and the scope (in terms of geography, species or products) is clearly defined.	3
The company makes a universal commitment to providing effective species-specific enriched environments across all relevant geographies, species, and products.	5
	(Max Score 5)

Q6. 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 concerns[15]. In farmed fish species this includes heat treatment of eggs to induce triploidy, which renders fish sterile.

No stated position.	0
The company has made 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 has made 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
The company makes a universal commitment to the 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)

Q7. 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 has made 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 has made a partial commitment to the avoidance of growth promoting substances, but the scope (in terms of geography, species and products) is clearly defined.	3
The company makes a universal commitment to the avoidance of growth promoting substances.	5
	(Max Score 5)

Q8. 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 rapidly . 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 has made 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 has made 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
The company makes a universal commitment to the reduction or avoidance of the routine use of antibiotics across all geographies, species and products.	5
	(Max Score 5)

Q9. 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 has made 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 has made a partial commitment to the avoidance of routine mutilations and the scope (in terms of geography, species and products) is clearly defined.	3
The company makes a universal commitment to the avoidance of routine mutilations across all relevant 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 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
The company makes a 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)

Q11. 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
The company makes a universal commitment to avoid the use of long distance live transportation across all species, own-brand and other branded products and geographies.	5
	(Max Score 5)

Governance and Management

Q12. 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.

Management responsibility

No clearly defined management responsibility.	0
The company has published details of the management position with responsibility for farm animal welfare on a day-to-day basis.	5

Board or senior management responsibility

No clearly defined board or senior management responsibility	0
The company has published details of how the board or senior management oversees the implementation of the company's farm animal welfare policy.	5
	(Max Score 10)

Q13. 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)

Q14. Does the company report on its performance against its animal welfare 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 its objectives and targets.	0
The company reports on how it has performed against its objectives and targets.	5
	(Max Score 5)

Q15. 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.	
Employee training	
No information provided on employee training in farm animal welfare.	0
The company provides specific training to employees in farm animal welfare.	5
Actions taken in the event of non-compliance	
The company provides no information 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)

Q16. 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
Does the company describe how it implements its farm animal welfare policy (or equivalent) through its supply chain via supplier contracts?	
No information on how farm animal welfare is included in supplier contracts.	0
The company incorporates farm animal welfare into contractual obligations for suppliers but this is limited by geography and/or certain products or species	3
The company incorporates farm animal welfare into contractual obligations for suppliers across all species, products and geographies.	5
Does the company describe how it implements its farm animal welfare policy (or equivalent) through its supply chain via monitoring and auditing?	
No information provided on how supplier compliance with contract conditions is monitored.	0
The company specifies farm animal welfare as part of supplier auditing programme.	5
Does the company describe how it implements its farm animal welfare policy (or equivalent) through its supply chain via education and support?	
No information provided on the specific support and/or education provided to suppliers.	0
The company provides specific support and/or education provided to suppliers on farm animal welfare policy/issues.	5
	(Max Score 15)

Q17. 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)

Q18. 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.	
Involvement in research and development	
No evidence of involvement in research and development programmes to improve farm animal welfare.	0
Evidence of current involvement in research and development programmes to improve farm animal welfare.	5
Involvement in industry or other initiatives	
No evidence of active company involvement in industry or other initiatives directed at improving farm animal welfare.	0
Evidence of active company 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)

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)

Q20. Does the company report on the proportion of animals (or volume of fresh or frozen animal products and ingredients) in its global supply chain that is free from 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 used for 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)

Q21. Does the company report on the proportion of animals for own-brand products in its global supply chain that is provided with effective species-specific enriched environments?	
In addition to having clear policy commitments and management practices, companies are expected to maintain strict reporting criteria for animals in their supply chain. Examples can include (but are not limited to) brushes for dairy cows; manipulable materials such as straw for pigs; pecking and dustbathing substrates, and perches for chickens; bathing water for ducks.	
No reporting on the proportion of animals provided with effective species-specific enriched environments.	0
The company reports on the proportion of animals provided with effective species-specific enriched environments but this reporting is limited to certain geographies, species or own-brand products.	3
The company reports fully on the proportions of animals provided with effective species-specific enriched environments across all relevant geographies, species and products.	5
	(Max Score 5)

Q22. Does the company report on the proportion of animals in its global supply chain that is free from routine mutilations (i.e. castration, teeth clipping, tail docking, toe clipping, dehorning, desnooding, de-winging, 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 is free from routine mutilations.	0
The company reports on the proportion of animals that is 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 is 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 that are 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 proportion of animals in its global supply chain that is ineffectively stunned, i.e. are subject to back-up or repeat 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. 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. This question is looking specifically at monitoring the effectiveness of pre-slaughter stunning of animals (or the rendering of fish insensible) in their supply chains as well as the attentiveness of operators to identify when a back-up stun or a repeat stun is required.

No reporting on the proportion of animals subject to back-up or repeat stunning.	0
The company reports on the proportion of animals subject to back-up or repeat 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 back-up or repeat stunning, covering all relevant geographies, species and own-brand products.	5
	(Max Score 5)

Q25. 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 reports on the live transport times for animals, but this reporting is limited to certain geographies, species or own-brand products.	3
The company reports fully on the live transport times for animals, covering all relevant geographies, species and own-brand products.	5
	(Max Score 5)

Q26. 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 bites and other lesions.
- For broiler chickens: gait score, footpad dermatitis, hockburn, 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, socializing.
- For transportation: injuries, fatigue, road traffic incidents, mortality (dead-on-arrival/DOA).
- For slaughter: effectiveness of stunning.

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

Q27. 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)

Q28. 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 is from cage-free hens. NB. Companies that report on the proportion of shell eggs or eggs as ingredients that is sourced from laying hens 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 is cage-free, or no reported information.	0
1 – 25% of laying hens is cage-free.	0.5
26 – 50% of laying hens is cage-free.	1.5
51 – 75% of laying hens is cage-free.	2.5
76 – 99% of laying hens is cage-free.	3.5
100% of laying hens is cage-free.	5
	(Max Score 5)

Q29. What proportion of fresh/frozen pork products and ingredients in the company's global supply chain is sourced from pigs that is free from sow stalls?	
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? NB. Companies that report on the proportion of fresh/frozen pork products and ingredients that is sourced from pigs that are free from sow stalls 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 is free from sow stalls, or no reported information.	0
1 – 25% of sows is free from sow stalls.	0.5
26 – 50% of sows is free from sow stalls.	1.5
51 – 75% of sows is free from sow stalls.	2.5
76 – 99% of sows is free from sow stalls.	3.5
100% of sows is free from sow stalls.	5
	(Max Score 5)

Q30. 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 is 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 is free from tethering, or no reported information.	0
1 – 25% of dairy cows is free from tethering.	0.5
26 – 50% of dairy cows is free from tethering.	1.5
51 – 75% of dairy cows is free from tethering.	2.5
76 – 99% of dairy cows is free from tethering.	3.5
100% of dairy cows is free from tethering.	5
	(Max Score 5)

Q31. 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 meat that is sourced from 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 is reared at lower stocking densities.	0.5
26 – 50% of broiler chickens is reared at lower stocking densities.	1.5
51 – 75% of broiler chickens is reared at lower stocking densities.	2.5
76 – 99% of broiler chickens is reared at lower stocking densities.	3.5
100% of broiler chickens is reared at lower stocking densities.	5
	(Max Score 5)

Q32. 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 is free from beak trimming or tipping. NB. Companies that report of the proportion of shell eggs or eggs as ingredients that is 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 is free from beak trimming or tipping, or no reported information.	0
1 – 25% of laying hens is free from beak trimming or tipping.	0.5
26 – 50% of laying hens is free from beak trimming or tipping.	1.5
51 – 75% of laying hens is free from beak trimming or tipping.	2.5
76 – 99% of laying hens is free from beak trimming or tipping.	3.5
100% of laying hens is free from beak trimming or tipping.	5
	(Max Score 5)

Q33. 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 is free from tail docking. NB. Companies that report on the proportion of fresh/frozen pork products and ingredients that is 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 is free from tail docking, or no reported information.	0
1 – 25% of pigs is free from tail docking.	0.5
26 – 50% of pigs is free from tail docking.	1.5
51 – 75% of pigs is free from tail docking.	2.5
76 – 99% of pigs is free from tail docking.	3.5
100% of pigs is free from tail docking.	5
	(Max Score 5)

Q34. 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 is free from tail docking. NB. Companies that report on the proportion of fresh/frozen milk products and ingredients that is 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 is free from tail docking, or no reported information.	0
1 – 25% of dairy cows is free from tail docking.	0.5
26 – 50% of dairy cows is free from tail docking.	1.5
51 – 75% of dairy cows is free from tail docking.	2.5
76 – 99% of dairy cows is free from tail docking.	3.5
100% of dairy cows is free from tail docking.	5
	(Max Score 5)

Q35. What proportion of the company's supply of chicken meat (fresh/frozen/processed and ingredient) comes from strains of birds with improved welfare outcomes and with a slower growth potential (defined as <55g/d averaged over the growth cycle according to the breeding company specification)?	
Breeds of chicken selected for high growth rate, lean meat deposition and high feed conversion efficiency suffer a range of physiological and metabolic health issues, as well as poor immunity and walking ability. Such breeds are lethargic and have increasing meat quality issues. Breeds with slower growth potential tend to have better welfare outcomes.	
0% of products is from strains of birds with improved welfare outcomes and with a slower growth potential, or no reported information.	0
1 – 25% of products is from strains of birds with improved welfare outcomes and with a slower growth potential (or scope of reporting is not clear).	0.5
26 – 50% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	1.5
51 – 75% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	2.5
76 – 99% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	3.5
100% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	5
	(Max Score 5)

Q36. What proportion of animals (excluding fin fish) 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 is from animals that have been pre-slaughter stunned, or no reported information.	0
1 – 25% of products is from animals that have been pre-slaughter stunned.	0.5
26 – 50% of products is from animals that have been pre-slaughter stunned.	1.5
51 – 75% of products is from animals that have been pre-slaughter stunned.	2.5
76 – 99% of products is from animals that have been pre-slaughter stunned.	3.5
100% of products is from animals that have been pre-slaughter stunned.	5
	(Max Score 5)

Q37. 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 as the deterioration of water quality, especially the depletion of oxygen or accumulation of carbon dioxide and ammonia.	
0% of animals is transported in 8 hours or less, or no reported information.	0
1 – 25% of animals is transported in 8 hours or less.	0.5
26 – 50% of animals is transported in 8 hours or less.	1.5
51 – 75% of animals is transported in 8 hours or less.	2.5
76 – 99% of animals is transported in 8 hours or less.	3.5
100% of animals is transported in 8 hours or less.	5
	(Max Score 5)

***Notes**

1. For questions 28-31, we only assess those questions that are relevant to the company. We assess relevant questions, with the maximum possible score being five (5) points per question and use these scores to calculate an overall average score out of 20 points.
2. For questions 32-34, we only assess those questions that are relevant to the company. We assess relevant questions, with the maximum possible score being five (5) points per question and use these scores to calculate an overall average score out of 15 points.

Appendix 2

2019 Benchmark companies

	Company	Ownership	ICB Classification	Country of Origin / Incorporation
1.	Aeon Group	Public	5337: Food Retailers and Wholesalers	Japan
2.	Ahold Delhaize	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 and Wholesalers	USA
7.	Auchan Holdings	Private	5337: Food Retailers and Wholesalers	France
8.	BJ's Wholesale Club Holdings	Public	5337: Food Retailers and Wholesalers	USA
9.	C&S Wholesale	Private	5337: Food Retailers and 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: Food Retailers and Wholesalers	Chile
13.	China Resources Vanguard	Public	5337: Food Retailers and Wholesalers	China
14.	Coles Group	Public	5337: Food Retailers and Wholesalers	Australia
15.	Colruyt	Private	5337: Food Retailers and Wholesalers	Belgium
16.	Conad Consorzio Nationale	Cooperative	5337: Food Retailers and Wholesalers	Italy
17.	The Co-op (UK)	Cooperative	5337: Food Retailers and Wholesalers	UK
18.	Coopérative U Enseigne	Cooperative	5337: Food Retailers and Wholesalers	France
19.	Coop Group (Switzerland)/Coop Genossenschaft	Cooperative	5337: Food Retailers and Wholesalers	Switzerland
20.	Coop Italia	Cooperative	5337: Food Retailers and Wholesalers	Italy
21.	Costco Wholesale Corp	Public	5337: Food Retailers and Wholesalers	USA
22.	Couche-Tard	Public	5337: Food Retailers and Wholesalers	Canada
23.	E Leclerc	Cooperative	5337: Food Retailers and Wholesalers	France
24.	Edeka Group	Private	5337: Food Retailers and Wholesalers	Germany
25.	Empire Company/Sobey's	Public	5337: Food Retailers and Wholesalers	Canada
26.	H E Butt Company	Private	5337: Food Retailers and Wholesalers	USA
27.	ICA Gruppen AB	Public	5337: Food Retailers and Wholesalers	Sweden
28.	IKEA (Inter IKEA Group)	Private	5337: Food Retailers and Wholesalers	Sweden
29.	J Sainsbury PLC	Public	5337: Food Retailers and Wholesalers	UK
30.	Jeronimo Martins	Public	5337: Food Retailers and Wholesalers	Portugal
31.	(The) Kroger Company	Public	5337: Food Retailers and Wholesalers	USA
32.	Les Mousquetaires	Private	5337: Food Retailers and Wholesalers	France
33.	Lianhua Supermarket Holdings Co	Public	5337: Food Retailers and Wholesalers	China
34.	Lidl Stiftung & Co KG	Private	5337: Food Retailers and Wholesalers	Germany
35.	Loblaw Companies Limited	Public	5337: Food Retailers and Wholesalers	Canada
36.	Marks & Spencer PLC	Public	5337: Food Retailers and Wholesalers	UK
37.	Mercadona SA	Private	5337: Food Retailers and Wholesalers	Spain
38.	Metro AG	Public	5337: Food Retailers and Wholesalers	Germany
39.	Migros-Genossenschafts-Bund	Cooperative	5337: Food Retailers and Wholesalers	Switzerland
40.	Publix Super Markets Inc	Private	5337: Food Retailers and Wholesalers	USA
41.	Rewe Group	Cooperative	5337: Food Retailers and Wholesalers	Germany
42.	Schwarz Unternehmens Treuhand KG/Kaufland	Private	5337: Food Retailers and Wholesalers	Germany
43.	Seven & i Holdings	Public	5337: Food Retailers and Wholesalers	Japan
44.	Sysco Corporation	Public	5337: Food Retailers and Wholesalers	USA
45.	Target Corporation	Public	5337: Food Retailers and Wholesalers	USA
46.	Tesco PLC	Public	5337: Food Retailers and Wholesalers	UK
47.	UNFI	Public	5337: Food Retailers and Wholesalers	USA
48.	Waitrose	Partnership	5337: Food Retailers and Wholesalers	UK
49.	Walmart Inc/Asda	Public	5337: Food Retailers and Wholesalers	USA
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 and Bars	USA
60.	CNHLS	Public	5757: Restaurants and Bars	China
61.	Compass Group PLC	Public	5757: Restaurants and Bars	UK
62.	Cracker Barrel	Public	5757: Restaurants and Bars	USA
63.	Cremonini SpA	Private	5757: Restaurants and Bars	Italy
64.	Darden Restaurants PLC	Public	5757: Restaurants and Bars	USA
65.	Dicos/Ting Hsin International Group	Public	5757: Restaurants and Bars	Taiwan
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 and Bars	Brazil
72.	JAB Holdings	Public	5757: Restaurants and Bars	Luxembourg
73.	JD Wetherspoon PLC	Public	5757: Restaurants and Bars	UK
74.	McDonald's Corporation	Public	5757: Restaurants and Bars	USA
75.	Mitchells & Butlers PLC	Public	5757: Restaurants and Bars	UK
76.	Papa John's Pizza	Public	5757: Restaurants and Bars	USA
77.	Restaurant Brands International	Public	5757: Restaurants and Bars	Canada
78.	Sodexo	Public	5757: Restaurants and Bars	France
79.	Inspire Brands, Inc	Private	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 and Bars	USA
84.	Umoe Gruppen AS	Public	5757: Restaurants and Bars	Norway
85.	Wendy's Company (The)	Public	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)	Public	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.	ConAgra Brands Inc	Public	3570: Food Producer	USA
101.	Cooke Seafood Inc	Private	3570: Food Producer	USA
102.	Cooperativa Centrale 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.	KraftHeinz	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.	Maruha Nichiro	Public	3570: Food Producer	Japan
124.	Mars Inc	Private	3570: Food Producer	UK
125.	Meiji Holdings	Public	3570: Food Producer	Japan
126.	Minerva Foods	Public	3570: Food Producer	Brazil
127.	Mondelez International	Public	3570: Food Producer	USA
128.	Mowi ASA	Public	3570: Food Producer	Norway
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 Ham	Public	3570: Food Producer	Japan
133.	Noble Foods	Private	3570: Food Producer	UK
134.	OSI Group	Private	3570: Food Producer	USA
135.	Perdue Farms	Private	3570: Food Producer	USA
136.	Plukon Food Group	Private	3570: Food Producer	Netherlands
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	Public	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

[1]For example, World Animal Protection. (2019). Valuing Higher Welfare Chicken: Making the financial case for higher welfare chicken. Available via https://www.worldanimalprotection.org/sites/default/files/media/int_files/valuing_higher_welfare_chicken_report.pdf

[2]Annual BBFAW reports (for 2012-2019) can be downloaded from http://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 http://www.bbfaw.com/publications/

[4]A fuller description of the company research process is provided in the Methodology Report which accompanies this report. See http://www.bbfaw.com/publications/.

[5]See BBFAW 2017 Report, available at www.bbfaw.com/publications

[6]This question was asked for the first time in 2019 and the scoring has been excluded from company scores this year to allow companies a one-year grace period. This is consistent with the way that the BBFAW has previously introduced new criteria.

[7]The companies publishing universal commitments to the provision of species-specific environmental enrichment include: BRF, Cranswick, Marks & Spencer and Unilever.

[8]The companies with formal universal commitments to the avoidance of close confinement include: Chipotle Mexican Grill, Cranswick, Hilton Food Group, Marks & Spencer, Noble Foods and Premier Foods.

[9]Q35 was a new question in 2019 and so was not included in the calculation of individual company scores.

[10]These are:
- Q28. Proportion of laying hens that is cage-free
- Q29. Proportion of pigs free from sow stalls/gestation crates
- Q30. Proportion of dairy cows that is free from tethering
- Q31. Proportion of broiler chickens at lower stocking densities

[11]These are:
- Q32. Proportion of laying hens free from beak trimming
- Q33. Proportion of pigs free from tail docking
- Q34. Proportion of dairy cattle free from tail docking

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

[13]The initiative is now (December 2019) supported by Aberdeen Standard Investments, ACTIAM, AMP Capital Ethical Leaders Fund, Australian Ethical InvestmentsInvestment, Aviva Investors, Bâtirente, BMO Asset Management, (EMEA), BNP Paribas Investment Partners, Boston Trust Walden Trust, Brunel Pension Partnership, Candriam, Castlefield Investment Partners LLP, the Central Finance Board of the Methodist Church, Coller Capital, EdenTree Investment Management, Epworth Investment Management, Ethical Partners Funds Management, Hexavest, Karner Blue Capital, KBI Global Investors, NEI Investments, Rathbone Greenbank Investments, Robeco, RRSE (Le Regroupement pour la responsabilité sociale des entreprises,), Schroders, Simplicity AB, Sonen Capital, The Sustainability Group of Loring, Wolcott & Coolidge Trust LLC, Trillium Asset Management and Triodos BankInvestment Management.

[14]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

[15]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. BBFAW Investor Briefing No. 6 (September 2012) (BBFAW, London), http://www.bbfaw.com/media/1083/briefing-no6_cloning-and-genetic-engineering-of-farm-animals.pdf

Related partner initiatives

COMPASSION in world farming
ciwf.org

Compassion in World Farming: Food Business Programme

More than a decade since the launch of the first Good Egg Awards, Compassion's 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 1.88 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 **https://www.compassioninfoodbusiness.com**

WORLD ANIMAL PROTECTION

World Animal Protection

World Animal Protection is a founding partner of the Business Benchmark for Farm Animal Welfare (BBFAW). Our Corporate Engagement team actively works to encourage companies to improve animal welfare in their supply chains. Companies are supported with developing policy change and subsequently implementing and evaluating their success. Our evaluation consists of reviewing the welfare inputs and measures based on improved husbandry on supplier farms.

The annual Pecking Order report is the only global assessment of how fast-food brands are managing the welfare of chickens farmed for meat. This report provides a corporate framework to measure and manage broiler welfare worldwide.

To learn more about how iconic fast-food chains are performing please see: **https://www.worldanimalprotection.org.uk/pecking-order-2020**

Producers and distributors of seafood can play a huge role in tackling the problem of 'ghost gear'. Ghost gear is the lost and abandoned fishing equipment which can result in marine animals suffering. World Animal Protection founded the Global Ghost Gear Initiative (GGGI) in 2015. The GGGI is a global coalition of NGOs, fishing industry, private sector, academia and governments working together to solve the problem of ghost gear. Together the coalition builds evidence, defines best practice and informs policy to create replicable sustainable solutions. In 2019 the role of GGGI lead partner was passed on to the Ocean Conservancy.

World Animal Protection's 2018 Ghosts Beneath the Waves report reviewed what proportion of and how the largest seafood companies are dealing with abandoned, lost or discarded fishing gear. The report detailed the origins, causes and effects of the problem of ghost gear. The steps that the GGGI has taken to prevent, mitigate and resolve the problem of ghost gear are set out in this report.

The 2019 edition of the Ghosts Beneath the Waves report provides an update on the ghost gear problem and our analysis of the companies' management of ghost gear. The report details what both World Animal Protection and the GGGI have done to address the problem of ghost gear.

Other Wold Animal Protection initiatives include the Animal Protection Index (API), the Universal Declaration on Animal Welfare (UDAW), and the Global Animal Network (GAN). The API is a ranking of 50 countries around the globe according to their commitments to protect animals and improve animal welfare in policy and legislation. The UDAW represents a global commitment, inspiring international, regional and national change to improve animal welfare and World Animal Protection is working to have UDAW backed by the United Nations. The GAN is an online resource showcasing science, research and professional expertise to support improving animal welfare worldwide.

More information about our work on animal welfare can be found at **https://www.worldanimalprotection.org**

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Business Benchmark
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For further information please email **secretariat@bbfaw.com**