

Embargoed until 00:01 BST, Thu 25 April 2024

NEW BASELINE FOR ANIMAL WELFARE IMPROVEMENT LAUNCHED, AS LEADING BENCHMARK BEEFS UP CRITERIA

*Ranking of 150 leading food companies on animal welfare
will inform \$2.3 trillion investor coalition.*

- Relunched [Business Benchmark on Farm Animal Welfare](#) (BBFAW) introduces tougher criteria with greater focus on how companies deliver welfare performance.
- **95%** of global food companies now recognise ‘farm animal welfare’ as a core business issue, with **Marks & Spencer, Premier Foods and Waitrose** as the highest-ranked companies.
- **93%** of companies however given poor ‘E’ or ‘F’ rating for ‘Performance Impact’ – a measure of whether farm animals in their supply chains are actually protected from inhumane practices such as close confinement or routine mutilation.
- **19** global food companies, including **Domino’s Pizza Inc** (US) and **Yum China Holdings** (the owners of KFC in China), have yet to publish a formal farm animal welfare policy.
- A **\$2.3 trillion investor coalition** is set to engage with food companies about the BBFAW results.

(London, 25 April 2024). Today’s publication of the [Business Benchmark on Animal Welfare](#) (BBFAW) reveals that most global food giants (**95%**) acknowledge the importance of animal welfare and are addressing it with policy commitments and clearer governance.

Few however are reporting successful implementation of these ambitions with **93%** given the lowest ratings (‘E’ or ‘F’) for ‘Performance Impact’ i.e. an assessment of the tangible impacts on the lives of farm animals reared for food in corporate supply chains. For example, progress on issues such as the time farm animals spend in live transportation, or in close confinement such as gestation crates, remains disappointingly slow.

A total of 150 global food producers, retailers and food-service companies with combined revenues of more than US\$4.9 trillion, including the likes of **McDonalds, Tesco** and **Tyson Foods**, were ranked by BBFAW, which this year introduced tougher assessment criteria and an increased focus on ‘Performance Impact’, and included new questions on how companies are recognising the need to reduce reliance on animal sourced foods and diversify into alternative proteins. BBFAW was originally launched in 2012 and remains the leading global assessment of companies’ farm animal welfare policies and practices. It is supported by partners Compassion in World Farming and FOUR PAWS and by a coalition of institutional

investors, managing over \$2.3 trillion in assets who will engage with the companies in the year ahead to drive improvement.

This year's benchmark found several encouraging signs as it set a new baseline for corporate performance, including:

- The vast majority of benchmarked companies (**95%**) now identify farm animal welfare as a relevant business issue, up from 79% in 2012¹.
- Three companies (**Marks & Spencer, Premier Foods, Waitrose**) achieved 'Tier 2' status, therefore demonstrating leadership in making farm animal welfare integral to their business strategy.
- The highest scoring companies on 'Performance Impact' - a measure for how well businesses demonstrate actual welfare benefits for farm animals in their global supply chain - were the six companies (4%) that achieved a 'C' rating: **Marks & Spencer (UK), Groupe Danone (FR), Premier Foods (UK), Waitrose (UK), Cranswick PLC (UK) and Migros-Genossenschafts-Bund (Switzerland)**.
- There are generally high levels of ambition on **cage-free eggs**, with **73%** of the 141 companies that have eggs in their supply chains now having cage-free egg commitments.
- A new section of the assessment found that **25%** of benchmarked companies recognise the need to reduce reliance on animal sourced foods as a relevant business issue, with 21 companies including **Greggs, Sodexo** and **Carrefour** publishing time-bound targets.

However, many findings in this year's benchmark also showed the work that still needs to be done by the food sector:

- **Implementation lags commitment:** 93% of companies rated as 'E' or 'F' on 'Performance Impact', and no firm achieved the top 'A' or 'B' impact rating. Companies with the lowest 'F' impact rating include **Amazon Whole Foods, Domino's Pizza Inc, Müller** and **Tyson Foods**.
- **No policy:** 19 global food companies, including **Yum China Holdings** (owners of KFC in China) and **Domino's Pizza Inc (US)**, have yet to even publish a formal farm animal welfare policy.
- **Close confinement:** **18%** of companies, including **Tyson Foods** and **WH Group** (which includes large US pork producer Smithfield) have no policy commitment to end the use of close confinement. Only **9%** of companies with pigs in their supply chain (13 of 137 companies) have set credible targets to end the use of 'sow stalls' or 'gestation crates' i.e. metal enclosures barely bigger than an adult pig which are banned in jurisdictions such as the UK, Sweden and several US states. BBFAW defines a credible target as a time-bound target that restricts crate use to no more than 4 hours, with those failing to meet this criteria including **Walmart** and **Cargill**.
- **Routine mutilation:** A majority of companies (52%) have no policy to manage routine mutilations - such as branding with hot irons or tail docking in pigs and cattle.

¹ The 2012 benchmark assessed 68 companies, and hence the 79% figure represents 54 of 68 companies.

- **Live transport:** Only 27% of assessed companies report that live transportation of farm animals is restricted to short journeys only (i.e. 4 hours or less for poultry and rabbits, and 8 hours for other species).
- **Antibiotics:** Only 40% of companies have commitments in place to end prophylactic and routine metaphylactic antibiotic use – despite the risk of surging antibiotic resistance.

Nicky Amos Executive Director of the BBFAW said:

“The BBFAW results show that for 95% of food companies protecting farm animal welfare is not about businesses doing good; it’s about good business. The Benchmark’s criteria have been strengthened in 2024, so it’s encouraging that several companies, including the three that achieved ‘Tier 2’ status, are leading by example and showing that high levels of progress are possible. It’s also highly encouraging that 1 in 4 food companies recognise the need to innovate to reduce reliance on animal sourced foods as part of long-term plans to create sustainable food supply chains.”

“Today’s analysis shows there’s also a long way to go for the food sector to turn awareness and commitment into demonstrable animal welfare benefits, with large numbers of farmed animals still suffering from inhumane practices such as close confinement or routine mutilations.”

Abigail Herron, Global Head of Health and Nature Policy at Aviva investors – one of 32 institutional investors supporting BBFAW, said:

“The Business Benchmark on Animal Welfare continues to be a valuable guide in helping investors analyse management quality in a systematic and consistent manner across the global food industry. Importantly, this data also exists at the intersection between critical issues including animal welfare and antimicrobial resistance, which present material financial risks to companies and shareholder returns. As an investor which regularly engages with companies operating in the global food sector, the BBAW helps to shine a light on those which are making critical progress towards addressing these challenges and enables us to analyse management quality in a systematic and consistent manner.”

Philip Lymbery, Global Chief Executive, Compassion in World Farming, said:

“There’s a high cost to poor animal husbandry. It not only harms animals but fuels the climate crisis, drives deforestation, biodiversity loss and - with its massive use of antibiotics - poses a real threat to human health. The Business Benchmark for Farm Animal Welfare continues to play a critical role in driving higher standards in the world’s leading food businesses, showing the benefits of this approach, and providing a vital yardstick to inform investor choices.”

Josef Pfabigan, CEO Four Paws, said:

“After a year’s break it is good to see the BBFAW report coming back strongly, as 2024 marks a pivotal year for animals with many elections around the globe highlighting the importance of improved legislation on animal welfare. FOUR PAWS’ vision is a world where humans treat animals with respect, empathy and understanding. More food companies need to work towards the same goal, which is a reduction in produced animals. Progress on this goal helps reduce the enormous suffering billions of farm animals are facing, especially in the Global North. It also helps fight a key driver of the climate crisis as animal agriculture makes up around a sixth of all man-made greenhouse gas emissions. Therefore, FOUR PAWS supports BBFAW’s work to encourage higher animal welfare and an immediate transition towards sustainable and cruelty-free food systems globally. Only together are we able to achieve that.”

The full report is available [here](#)

Notes to editor

- For further information or to arrange interviews with BBFAW spokespeople, Aviva Investors or companies assessed, please contact:
 - Sasha Hill, Chronos Sustainability (BBFAW Secretariat)
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- A full list of the 150 companies assessed and their ranking is below
- The 32 institutional investors supporting BBFAW are: Aberdeen Standard Investments, AMP Capital Ethical Leaders Fund, Australian Ethical Investment, Aviva Investors, Bâtirente, BNP Paribas Asset Management, Boston Trust Walden, Brunel Pension Partnership, Candriam, Cardano, Castlefield, Investment Partners LLP, CCLA, Central Finance Board of the Methodist Church, Collier Capital, EdenTree Investment Management, Epworth Investment Management, Ethical Partners Funds Management, Greenbank, Karner Blue Capital, KBI Global Investors, Länsförsäkringar Fondförvaltning AB, NEI Investments, OpenInvest, Robeco, RRSE, Simplicity, Sonen Capital, The Sustainability Group of Loring, Wolcott & Coolidge Trust, LLC, Trillium Asset Management, Triodos Investment Management, Vaudoise Assurances Holding SA.
- The Business Benchmark on Farm Animal Welfare (BBFAW) was formed in 2012 and is the globally recognised investor framework for assessing the quality of companies’ practices, processes and performance on farm animal welfare. In 2023 criteria for the benchmark were reset to set a new baseline, hence year-on-year comparisons for companies are not available. Companies were assessed on their approach to managing farm animal welfare in five areas: (1) Policy Commitments, (2) Governance and Management, (3) Targets (4) Performance Impact; and (5) Reducing Reliance on animal sourced foods.
- The BBFAW assessment criteria have changed substantially since the last benchmark (2021) to put a greater focus on the Benchmark’s role in driving meaningful change and ensuring tangible improvements to the lives of farm animals reared for food. In particular the number of questions on ‘Performance Impact’ increased from 10 to 20, and these questions now represent 55% of the overall benchmark score (compared to 45% in 2021). These criteria have also seen the introduction of new questions and a new pillar of the assessment criteria focused on reducing reliance on animal-sourced foods in human diets. These changes have led to resetting of the benchmark, with the BBFAW 2023 results representing a new baseline. Hence year-on-year comparisons in in areas such as overall average score, or in changes to companies’ Tier rankings have not been highlighted this year.
- Company assessments were based on information published by companies on the date of their assessments. All companies were assessed during the period from October to December 2023.

Figure 1.1
BBFAW 2023 Company Tier Rankings and Impact Rating IR

Tier 1 Leadership	Tier 2 Integral to business strategy	Tier 3 Established but work to be done	Tier 4 Making progress on implementation	Tier 5 On the business agenda but limited evidence of implementation	Tier 6 No evidence on the business agenda
0	3	6	18	65	58
	Marks & Spencer PLC C	Co-op UK D	ALDI Süd/ALDI Einkauf SE & Co. Ohg F	(The) Kroger Company F	Aeon Group F
	Premier Foods PLC C	Cranwick PLC C	Barilla SpA E	2 Sisters Food Group (Boparan Holdings Ltd) F	Albertsons F
	Waitrose C	Greggs PLC D	BRF SA E	Agro Super F	Alimentation Couche-Tard F
		Groupe Danone SA C	Carrefour SA F	Ahold Delhaize F	Amazon/Whole Foods Market F
		Migros-Genossenschafts-Bund C	Compass Group PLC F	ALDI Einkauf SE & Co. Ohg (ALDI Nord) F	Autogrill SpA F
		Noble Foods D	Danish Crown AmbA E	Aramark Corporation F	Beijing Dabeinong Technology Group Co., Ltd. F
			Fonterra E	Arla Foods Ltd F	BJ's Wholesale Club Holdings F
			Groupe Lactalis E	Bellis Topco Ltd./Asda F	Bloomin' Brands Inc F
			Hilton Food Group F	Bimbo F	C&S Wholesale F
			J Sainsbury PLC D	Cargill F	Campbell Soup Company F
			LDC Groupe F	Casino Guichard-Perrachon SA F	Camst - La Ristorazione Italiana Soc. Coop. ARL F
			Les Mousquetaires E	Charoen Pokphand Foods F	Cencosud F
			Marfrig Global Foods SA E	Chipotle Mexican Grill F	Chick-Fil-A F
			Minerva Foods E	Coles Group F	China Resources Vanguard F
			Royal FrieslandCampina E	Colruyt F	China Yurun Group Limited F
			Tesco PLC D	ConAgra F	CKE Restaurants F
			Unilever NV E	Coop Group (Switzerland)/Coop Genossenschaft F	Conad Consorzio Nazionale F
			Woolworths Limited E	Cooperativa Central Aurora Alimentos F	Cooke Seafood Inc F
				Coop Italia F	Costco Wholesale Corporation F
				Coopérative U Enseigne E	Cracker Barrel F
				Cooperl Arc Atlantique F	Dairy Farmers Of America F
				Cremonini SpA F	Darden Restaurants PLC F
				E.Leclerc F	Dico's/Ting Hsin International Group F
				EDEKA Group F	Domino's Pizza Inc F
				Elior Group F	Empire Company/Sobey's F
				Elo Group F	Gategroup Holding AG F
				Ferrero Group F	H E Butt Company F
				General Mills Inc F	Habib's F
				Gruppo Veronesi F	Industrias Bachoco F
				Hershey Co E	Inspire Brands Inc F
				Hormel Foods Corporation F	JAB Holding Company F
				ICA Gruppen AB F	Lianhua Supermarket Holdings Co F
				IKEA (Inter IKEA Group) F	Loblaw Companies Limited F
				JBS SA F	Mars Inc F
				JD Wetherspoon PLC F	Maruha Nichiro F
				Jeronimo Martins F	Meiji Holdings F
				Kerry Group F	Mercadona SA F
				Kraft Heinz Company F	Mondelēz International F
				Maple Leaf Foods F	New Hope Liuhe Co Ltd F
				McDonald's Corporation F	Nippon Ham F
				METRO AG F	Publix Super Markets Inc F
				Metro Inc F	Seaboard Corp F
				Mitchells & Butlers PLC F	Seven & i Holdings F
				Mowi ASA F	Spar Holding AG F
				Nestlé SA F	Starbucks Corporation F
				OSI Group F	Target Corporation F
				Papa John's Pizza F	UNFI F
				Perdue Farms F	Unternehmensgruppe Theo Müller F
				Plukon Food Group F	US Foods F
				Restaurant Brands International F	Walmart Inc F
				REWE Group F	Wayne-Sanderson Farms F
				Saputo Inc F	Wendy's Company (The) F
				Schwarz Gruppe F	Wens Foodstuff Group F
				Sodexo F	WH Group Ltd F
				SSP Group F	Yili Group F
				Subway/Doctor's Associates Inc F	Yonghui Superstores Co Ltd F
				Sysco Corporation F	Yum China Holdings F
				Terrena Group F	Zhongpin Inc F
				The Cheesecake Factory E	
				Tönnies Group F	
				Tyson Foods Inc F	
				Vion Food Group F	
				Whitbread PLC F	
				Wm Morrison Supermarkets PLC F	
				Yum! Brands Inc F	

BBFAW

Business Benchmark on
Farm Animal Welfare



The Business Benchmark on Farm Animal Welfare (BBFAW)

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. The BBFAW Secretariat 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. The programme is supported by Compassion in World Farming and FOUR PAWS, who provide technical expertise, guidance, funding and practical resources, alongside supporting the assessed food businesses with training, programmatic expertise and consultancy engagement.

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

Compassion in World Farming

Compassion in World Farming is the leading international farm animal welfare organisation dedicated to ending factory farming and reshaping the food system to benefit the lives of animals, people, and the health of the planet. Through campaigning, lobbying for legislative change, and positive engagement with the global food industry, we seek to influence key decision makers that shape, make and fund the food system. Through our Food Business programme, we work in partnership with leading food companies to drive transformational change for farm animal welfare, reduce the reliance on animal sourced foods and encourage a shift to regenerative farming practices.

FOUR PAWS

FOUR PAWS is the global animal welfare organisation for animals under direct human influence, which reveals suffering, rescues animals in need and protects them. Founded in 1988 in Vienna by Heli Dungler and friends, the organisation advocates for a world where humans treat animals with respect, empathy and understanding. The sustainable campaigns and projects of FOUR PAWS focus on companion animals including stray dogs and cats, farm animals and wild animals – such as bears, big cats and orangutans – kept in inappropriate conditions as well as in disaster and conflict zones. With offices in Australia, Austria, Belgium, Bulgaria, France, Germany, Kosovo, the Netherlands, Switzerland, South Africa, Thailand, Ukraine, the UK, the USA and Vietnam as well as sanctuaries for rescued animals in eleven countries, FOUR PAWS provides rapid help and long-term solutions. www.four-paws.org

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