

The Business Benchmark on Farm Animal Welfare Methodology Report 2018

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BBFAW
Business Benchmark
on Farm Animal Welfare



The Business Benchmark on Farm Animal Welfare

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

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

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

More information on the programme can be found at www.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 chains. The team offers strategic advice and expert technical support for the development, implementation and communication of higher welfare policies and practices, and, increasingly, frameworks for a more humane sustainable food system.

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

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

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



World Animal Protection

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

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

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Acknowledgements

This report has been prepared by the BBFAW Secretariat run by Chronos Sustainability Ltd. The lead authors were Nicky Amos and Dr Rory Sullivan, with contributions from Elisa Tjärnström, Darren Vanstone, Vanessa Gardner, Dr Steve Webster, Dr Heleen van de Weerd, Dr Jon Day and Jennifer Kozak.

We would like to thank the following for their support of this project and their contribution to the design and development of the 2018 Benchmark:

- Philip Lymbery, Dr Tracey Jones, Louise Valducci and the Food Business team (Compassion in World Farming).
- Steve McIvor, Dr Martin Cooke, Dr Sarah Ison, Rafel Servent, Rachel Lynch and the Corporate Engagement team (World Animal Protection).
- The many companies, investors and other stakeholders who participated in meetings and teleconferences, who provided input to the 2018 Benchmark consultation process, and who provided feedback on the assessment process and methodology.

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1. Introduction

The 2018 Business Benchmark on Farm Animal Welfare (BBFAW) Report¹, published in February 2019, provides an independent assessment of how 150 of the world's largest food companies are managing and reporting on farm animal welfare.

This Methodology Report, which accompanies the 2018 Business Benchmark Report, describes the framework used to evaluate companies on their farm animal welfare management and reporting. It also discusses changes to the framework and methodology since the 2017 Benchmark².

This report comprises the following Chapters:

- **Chapter 2: About the Business Benchmark on Farm Animal Welfare**
- **Chapter 3: The structure of the Benchmark**
- **Chapter 4: The assessment approach**
- **Chapter 5: 2018 assessment criteria**
- **Chapter 6: Company coverage**

2. About the Business Benchmark on Farm Animal Welfare



2.1 Why benchmark food companies?

Farm animal welfare is an important issue for companies across the food sector, including retailers, service companies, manufacturers, processors and producers. This importance has been driven by a range of factors, including regulation, consumer concern, pressure from animal welfare organisations, and the brand and market opportunities for companies that adopt higher farm animal welfare standards³.

2.2 Programme objectives

The Business Benchmark on Farm Animal Welfare (BBFAW) is designed to help drive higher farm animal welfare standards in the world's leading food businesses. Its aims are:

- To provide investors with the information they need to understand the business implications of farm animal welfare for the companies in which they are invested.
- To provide investors, governments, academics, NGOs, consumers and other stakeholders with an independent, impartial and reliable assessment of individual company efforts to adopt higher farm animal welfare standards and practices.
- To provide guidance to companies interested in improving their management and reporting on farm animal welfare issues.

The key tool for the delivery of these objectives is an annual benchmark of food companies' approach to farm animal welfare ('the Benchmark'). To date, seven Benchmarks have been completed, the most recent of which is the 2018 Benchmark⁴. The Benchmark enables investors, companies, NGOs and other stakeholders to understand and track corporate practice and performance on farm animal welfare.

Beyond the Benchmark, BBFAW produces a range of guidance and other materials for companies and investors on issues such as the business case for farm animal welfare, best practices in management and reporting, and new and forthcoming farm animal welfare-related regulations and policies.

BBFAW also has an extensive programme of structured engagement with investors and with companies. This engagement encourages investors to pay more attention to farm animal welfare in their investment processes and in their company dialogue, and encourages companies to improve their practices, performance and reporting on farm animal welfare.

2.3 Governance

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.

The BBFAW Steering Committee, comprising senior members from each of the founding partners, oversees the BBFAW programme's strategic development and budget.

The programme is managed by an independent Secretariat provided by Chronos Sustainability Ltd. In this role, Chronos Sustainability is responsible for providing the Executive Director and the other resources necessary to deliver the annual Benchmark, to conduct the company research and evaluations, and to engage with investors, companies and other stakeholders.

The development of the Benchmark is overseen by a Technical Working Group (TWG) comprising the BBFAW Secretariat and representatives of each of the founding partners. The members of the TWG, with their positions and affiliations when they were members of the TWG, for the 2018 benchmarking process were:

- Nicky Amos, Executive Director, BBFAW.
- Dr Martin Cooke, International Head of Corporate Engagement, World Animal Protection.
- Dr Tracey Jones, Director of Food Business, Compassion in World Farming.
- Rachel Lynch, Corporate Engagement Advisor, World Animal Protection.
- Dr Sarah Ison, Global Farm Animal Advisor, World Animal Protection.
- Dr Rory Sullivan, Expert Advisor, BBFAW.
- Louise Valducci, Head of Food Business (EU Programme), Compassion in World Farming.

2.4 Stakeholder engagement and the 2018 Benchmark

Investor and company engagement are integral parts of the Benchmark development and improvement process. Since the launch of the sixth Benchmark report in February 2018, the BBFAW Secretariat has:

- Participated in a series of conferences, roundtables and webinars, in the UK, Europe and North America.
- Continued to convene the Global Investor Collaboration on Farm Animal welfare, now supported by 21 institutional investors representing over £2.3 trillion in assets under management⁶.
- Continue to recruit signatories for the first ever Global Investor Statement on Farm Animal Welfare, now supported by 23 institutional investors representing approximately £2.5 trillion in assets under management⁷.
- Conducted formal surveys of how food companies and investors are using the Benchmark and on their approach to farm animal welfare more generally⁸.
- Conducted a formal consultation in June 2018 on the scope and criteria for the 2018 iteration of the Benchmark⁹.

3. The structure of the Benchmark



3.1 Alignment with corporate responsibility reporting

The structure of the BBFAW aligns with the way in which companies report on other sustainability-related issues. For any particular social or environmental issue, investors and other stakeholders generally expect companies to provide¹⁰:

- Information on the company's activities to the extent that such information is necessary to put its social and environmental impacts into context.
- A description of the company's governance and management arrangements for the environmental or social issue(s) in question.
- Details of the business risks and impacts of the issue(s) in question, together with a clear statement on the financial implications – positive or negative – of these issues for the business.
- Details of their policies on the issue(s) in question.
- A description of the company's engagement with relevant stakeholders on the issue(s) in question.
- Their objectives, targets and key performance indicators for the issue(s) in question, together with a discussion of how they intend to deliver on these objectives and targets.
- An assessment of their progress towards meeting their objectives and targets, together with a discussion of the factors that have affected their performance.
- An assessment of their performance against their policies and against other commitments (e.g. codes of conduct) that they have made.
- Forward-looking information on how performance is expected to evolve over time and the key factors (changes in the business environment, public policy and regulation, consumer trends, stakeholder pressures, etc.) that may affect performance.

3.2 Benchmark structure

The Benchmark has been designed to align with the reporting expectations above. The Benchmark – see further Chapter 5 – covers four core areas as follows:

- Management Commitment – description of the company's policies and positions on farm animal welfare, including specific commitments on critical animal welfare measures (e.g. the avoidance of close confinement, long distance live transportation).
- Governance and Management – board and senior management oversight of farm animal welfare strategy and operations, performance measurement, targets and objective setting, internal controls, the adoption of assurance standards, and reporting on progress against policy and objectives.
- Leadership and Innovation – investment in projects to advance farm animal welfare, external awards and accreditations, and advocacy on farm animal welfare.
- Performance Reporting and Impact – discussion of the company's performance against key animal welfare policies, targets and welfare outcome-based measures (e.g. species-specific indicators of animal well-being).

3.3 Farm animal welfare-specific issues

While, in many ways, farm animal welfare can be reported in a similar manner to other corporate responsibility issues, there are several specific issues and data that should also be reported by companies. Those that are relevant to the Benchmark are set out briefly here:

Management Commitment and Policy

1. Companies should provide a general account of why farm animal welfare is important to their business, including a discussion of the business risks and opportunities. Examples of the business issues that may be relevant include compliance with legislation and relevant voluntary and industry standards, security and sustainability of supply, productivity, waste, stakeholder/consumer expectations, pricing, risk management, reputation management, market opportunities, and business development.

2. Companies should publish an overarching farm animal welfare policy that sets out their core principles and beliefs on farm animal welfare, and that explains how these beliefs are addressed and implemented throughout the business. The policy should include:

- a. A clear statement of the reasons why farm animal welfare is important to the business.
- b. A clear position on its expected standards of farm animal welfare.
- c. A description of the processes (e.g. senior management oversight, commitments to continuous improvement, performance monitoring, corrective action processes, public reporting on performance) in place to ensure that the policy is effectively implemented.
- d. A clear definition of the scope of the policy, specifically whether the policy applies to all relevant animal species or not (including whether the policy – or a separate policy – applies to finfish aquaculture), whether the policy applies in all geographies or not, and whether the policy applies to all products the company produces, manufactures, sells or not.

3. Companies should set out their positions on priority farm animal welfare issues, including their positions on close confinement and intensive systems for livestock and finfish, on the use of meat from genetically modified or cloned animals or their progeny or descendants, on the use of growth promoting substances, on the use of prophylactic antibiotics, on the avoidance of routine mutilations, on the avoidance of meat from animals that have not been subject to pre-slaughter stunning, and on long distance live transportation.

4. As relevant to their activities and operations, companies should set out their positions on the production and/or sale of controversial products and practices such as foie gras and white veal.

5. As relevant to their activities and operations, companies should set out their positions on the religious slaughter of animals and explain whether or not the animals are pre-stunned.

Governance and Policy Implementation

6. Companies should specify who (i.e. the position/title of the relevant individual(s)) is responsible for managing farm animal welfare-related issues on a day-to-day basis, and who is responsible at senior management level for overseeing the company's farm animal welfare policy and its implementation.

7. Companies should:

- a. Publish the objectives they have set for farm animal welfare. These may be process objectives (e.g. to formalise their farm animal welfare management systems, to introduce audits), performance objectives (e.g. to phase out specific non-humane practices, to ensure that specific standards are met for all species) or some combination of the two.
- b. Specify the measures they are using to assess performance against these objectives and targets.
- c. Explain how these objectives and targets are to be delivered including, as appropriate, details of the capital and other costs that are expected to be incurred, and the timeframe for the delivery of these objectives and targets.
- d. Report on their performance against the objectives and targets they have set for themselves.

8. Companies should describe their internal systems and controls for farm animal welfare. This should include discussion of:

- a. Training in farm animal welfare for relevant employees.
- b. The actions to be taken in the event of non-compliance with the farm animal welfare policy.
- c. Monitoring processes (e.g. CCTV, whistle-blowing processes, testing procedures) in place to ensure compliance with the farm animal welfare policy.

9. Companies should describe how they implement their farm animal welfare policy through their supply chains. This should include discussion of:

- a. How farm animal welfare issues are integrated into supplier contracts or codes of conduct, including (as relevant) how farm animal welfare issues are considered in performance reviews, monitoring and auditing.
- b. How supplier performance on farm animal welfare is promoted.
- c. How employee and supplier competencies to effectively manage farm animal welfare are developed and maintained (e.g. training).

10. Companies should report on whether they assure their animals to a company-specific scheme, to a certified national assurance scheme or to third party schemes such as RSPCA Assured, Label Rouge, GLOBALG.A.P., GAP 5-step or EU organic standards.

Leadership and Innovation

11. Companies should indicate whether they are involved in research and development programmes to advance farm animal welfare, or in industry or other initiatives directed at improving farm animal welfare.

12. Companies should describe how they engage with their customers or clients on farm animal welfare.

Performance Reporting and Impact

13. Companies should report on their performance on farm animal welfare performance¹¹ (see Box 1 below for definitions). Within this, they should report on commonly accepted welfare issues (e.g. the proportion of animals free from close confinement, the proportion of animals that are pre-slaughter stunned, the maximum achieved journey times for live animals) as well as on species-specific key welfare outcome indicators (e.g. gait score and footpad dermatitis in broiler hens, tail-biting and lameness in pigs, bone breakage and feather coverage in laying hens, as well as those related to mental wellbeing and expression of natural behaviour) that they use to manage their business.

14. Companies should report on trends in performance, including discussion of the factors that have influenced performance (positively or negatively).

15. Companies should report on their performance on key welfare outcomes for specific species, as measured by:

- a. The proportion of defined species (e.g. laying hens, sows, broiler chickens, dairy cattle) free from close confinement.
- b. The proportion of defined species (e.g. laying hens, pigs) free from routine mutilations.
- c. The proportion of animals subject to pre-slaughter stunning.
- d. The proportion of animals transported within specified maximum journey times.

Box 1: Some useful definitions

Animal welfare encompasses not only physical wellbeing, but mental wellbeing and the ability to express important species-specific behaviours. All three aspects must be present for an animal to have a good quality of life. Animal welfare is about the welfare of the individual animal, and should be addressed through minimising the negative and maximising the positive experiences of the individual animals reared for food. Animal welfare provision is underpinned by good feeding, good housing (including appropriate design and environment provision), good health care, good breeding, and good management and stockmanship on farm, and of course good transport and slaughter conditions.

Performance in farm animal welfare is the action or process of achieving an acceptable level of welfare throughout the process of breeding, rearing/finishing, transporting and slaughtering of animals in the food industry. Performance reporting of a company's practices refers to disclosure of a combination of resource/ management inputs and indicators from the animals themselves (outcomes), both of which can be recorded quantitatively and objectively. Performance impact refers to the combination of these achievements on animal welfare.

Input-based measures refer to the type of production system (e.g. caged, barn, free-range) used – this includes aspects of the housing (e.g. space allowance, provision of environmental enrichment), treatments and procedures, breed use, feeding and health management (e.g. the use of preventative antibiotics) – as well as the practices for transport and slaughter.

Outcome-based measures focus on the most important species-specific measures (e.g. lameness and mastitis in dairy cows, gait score and footpad dermatitis in broilers, tail-biting and lameness in pigs, bone breakage and feather coverage in laying hens). Outcome-based measures are not confined to physical measures of wellbeing but also include aspects of mental wellbeing (e.g. reaction to humans or novelty, fear, comfort) and behaviour (e.g. time spent lying – resting, ruminating, or being active - foraging, perching, dust-bathing, socialising).



3.4 Weightings

The Benchmark criteria (see Appendix 1) cover four core areas as indicated in Table 1, with (maximum) points allocated to each area. In total, the Benchmark comprises 35 questions.

Table 1.1: Benchmark elements

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

3.5 Changes from the 2017 Benchmark

In order to ensure consistency with previous iterations of the Benchmark, the questions and the associated scoring remain relatively unchanged. However, we have increased the weighting for the performance reporting and impact section from 24 to 35%, in line with our stated aim of progressively increasing the Benchmark's emphasis on performance measurement and reporting. This change has resulted in corresponding reductions in the percentage weightings for the other sections of the Benchmark.

We made two other changes to the Benchmark. First, we added a question (Question 20) on company commitments to protein diversification to enable us to develop a current baseline on this issue. This question was not included in company scores. Second, we adjusted the performance question on stocking densities for broilers by reducing the maximum stocking density from 33 kg/m² to 30 kg/m². This change was made to align the question with World Animal Protection and Compassion in World Farming's current European and North American initiatives on maximum stocking densities.

4. The assessment approach



4.1 Focus on the corporate entity

The focus of the evaluation was the corporate entity (i.e. the parent company) rather than subsidiaries. This reflects the aim of the Benchmark to assess how each company manages farm animal welfare issues. The Benchmark did (as is seen in Chapter 5) however give credit for the actions (e.g. innovative practices and processes) of subsidiaries or for actions in specific geographic regions.

4.2 Reliance on published information

Each company was assessed on the information that was publicly available at the time of its assessment (company assessments were conducted in the period August to October 2018). The information reviewed for each company included formal reports (e.g. annual reports, corporate responsibility reports), the information on the company's corporate and consumer websites, and the information provided in documents such as press releases and frequently asked questions¹². We conducted similarly thorough reviews of the websites of company subsidiaries and brands, and, where relevant, postings on social media.

Company assessments were based entirely on information published at the time of the assessments. The reasons for relying on published information are to:

- Encourage better disclosure, which is a core objective of the BBFAW.
- Ensure that companies are assessed in a consistent manner (i.e. via an unbiased, objective evaluation of published information).
- Avoid any suggestion that companies working with Compassion in World Farming and/or World Animal Protection are advantaged by the assessment methodology.

We did not give credit for information provided on other websites but that was not provided on companies' websites or publications. For example, a number of the companies assessed had received farm animal welfare-related awards but did not refer to these awards on their own websites. Our rationale was that the lack of company acknowledgement of awards (or other positive developments) suggested that the company was either not interested in or unaware of these positive developments. This, in turn, raises questions about the level of attention being paid to farm animal welfare more generally.

4.3 Focus on farm animal welfare, not corporate responsibility/sustainability

The focus of the Benchmark was on farm animal welfare rather than on corporate responsibility or sustainability. We, therefore, did not give credit for general corporate responsibility or sustainability disclosures unless the company explicitly linked these to farm animal welfare and/or it was clear that farm animal welfare was an integral part of the company's CSR/sustainability management system.

4.4 Quality assurance and company reviews

In order to ensure consistency in the assessment process, all of the assessors participated in a one-day training and review session on the BBFAW methodology and research process. This session included a review of the lessons learned from previous Benchmarks and involved the assessor team working through the Benchmark on a question by question basis. New assessors (i.e. those assessors who had not previously participated in the BBFAW assessment process) were required to complete three company assessments, which needed to be completed to the satisfaction of Dr Rory Sullivan and Nicky Amos (from the BBFAW Secretariat) to demonstrate their understanding of the research process and methodology.

In order to ensure consistency in the assessment process, all company assessments were reviewed by another member of the assessment team (usually, Dr Rory Sullivan or Nicky Amos). The aims of this review were to ensure the factual accuracy of the

assessments, to ensure that questions were being interpreted and applied consistently, and to ensure that biases were not being introduced into the assessment process.

Following the initial assessments, individual company reports were reviewed by members of Compassion in World Farming's Food Business team and by World Animal Protection's Corporate Engagement team to check the factual accuracy of the content and to ensure consistency of the assessment methodology. The BBFAW Secretariat also reviewed the data to check if the assessment was penalising or favouring specific business models (for example, those with complex versus those with simple supply chains, those with multiple subsidiaries versus those with fewer subsidiaries, those whose principal business operations are within Europe versus those whose operations are outside of Europe, and those with multiple brands versus those with fewer brands).

Company reports based on our interim findings and scores were shared with companies in October and November 2018. Sixty-six of the 150 companies assessed responded with written comments or requested further dialogue on the assessment approach and scoring. As a result of these discussions, we made some amendments to the scores for 18 companies; the majority of these were minor, with only eight companies changing tier as a result.

It is important to stress that company scores were revised only in situations where there had been inconsistencies in the assessment process, either because of incorrect scores being awarded or because information that was in the public domain at the time of the assessment, had been overlooked or misinterpreted.

The final confidential company reports, showing individual scores and comments for each question, as well as overall company scores and comparable sector scores, were made available to the companies in February 2019.

4.5 Changes from the 2017 Benchmark

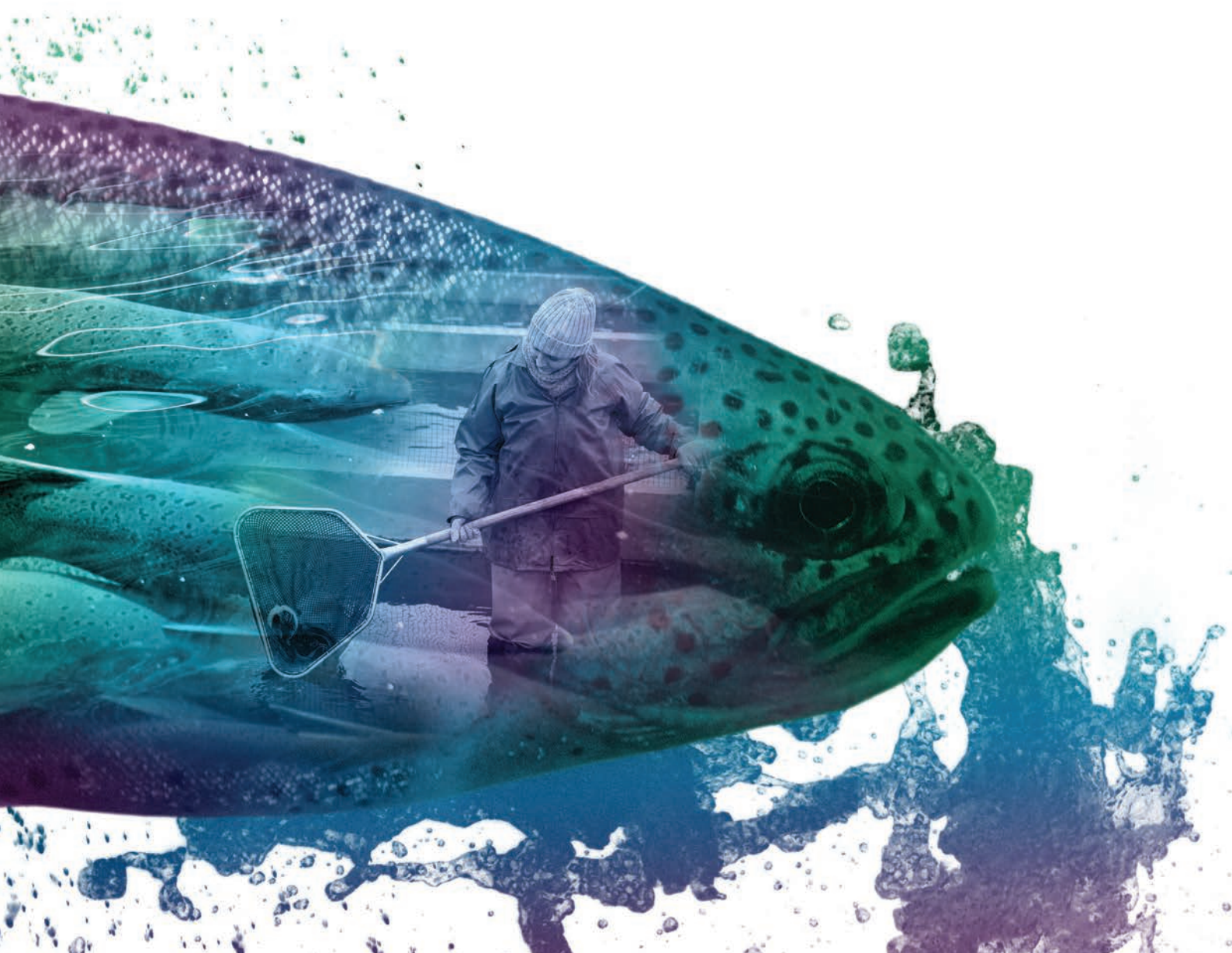
There were no changes in the assessment approach compared to previous Benchmarks. We continued to emphasise the importance of companies ensuring that the information provided is both up-to-date and accurate. As a general rule, unless the company clearly indicated that the information remained relevant and current, we did not give credit for information that was more than two years old. We note that where companies had, for example, set targets more than two years ago, this information was treated as current so long as the company confirmed its continued relevance to the business.

In the 2017 Benchmark, we advised a number of companies that their information was ambiguous and that, while we were willing to give them the benefit of the doubt, we expected them to update the information and/or confirm that the information remained current. Those companies that had not updated their information or had not confirmed that the information remained relevant saw certain of their scores reduced as a result.

Returning to a point we made in the 2016 and 2017 methodology reports, we continue to see improvement in the quality of corporate reporting. An increasing number of companies now provide a consolidated and organised account of their approach to farm animal welfare. In the best cases, this reporting not only facilitates our work when evaluating company approaches and performance, but also allows stakeholders to understand the business, to understand the relevance of farm animal welfare to the business, to understand how the company is currently managing farm animal welfare, and to understand how the company will manage farm animal welfare in the future. This, in turn, allows for more informed dialogue between companies and their stakeholders.

Despite these improvements, overall the information provided by companies is of variable quality. The quantity has increased but many companies make statements on farm animal welfare that are ambiguous or vague, or that do not allow us to make a robust assessment of their policies, practices or performance. For example, a number of companies have made high level statements on specific issues (e.g. on the avoidance of long-distance transport) but these statements do not specify what is meant in practice (e.g. live transportation is not specified in the context of maximum journey times). In our feedback, we made it clear to these companies that the Benchmark is looking for explicit statements, specific commitments and clear explanations about farm animal welfare.

5. 2018 assessment criteria



The 2018 assessment criteria are presented in Appendix 1. Each question is supported by a rationale, the scoring framework and explanatory notes on how the assessment was conducted, including any issues or questions identified in the 2018 assessment.

Notes on the scoring framework:

- A number of the questions are binary (i.e. yes/no) in nature. Examples include Question 1 and the two parts of Question 17. In these questions, companies score either full marks or zero for the question.
- Certain questions affect the scoring of subsequent questions. For example, Question 2 is scored only if a score has been awarded for Question 1, and Question 3 is scored only if a score has been awarded for Question 2. That is, a score of zero for Question 1 means that a company also receives a score of zero for Question 2 and, similarly, a score of zero for Question 2 means that a company also receives a score of zero for Question 3.
- For the majority of questions, the scoring is granular, allowing for criteria that are partially met (for example, where evidence is limited to a particular geography, species or product) to be acknowledged.
- Questions 27 to 33 are species specific and are only asked and incorporated into scores if the species are relevant to the company.

6. Company coverage



6.1 Benchmark scope

In total, 150 of the world's largest food companies were included in the 2018 Benchmark. A full list is presented in Appendix 2. These companies were broadly spread across the three food industry subsectors (see Table 2). The universe of companies is global although it continues to be weighted towards North American and European companies (see Table 3).

Table 2: Companies by sub-sector

Sub-sector (and ICB classification)	Number of companies
Food Retailers and Wholesalers (5337)	52
Restaurants and Bars (5757)	35
Food Producers (3570)	63
Total	150

Table 3: Companies by country of listing or incorporation

Country of listing or incorporation	Number of companies
USA	46 ¹³
UK	19
France	13
China	11
Germany	9
Italy	8
Brazil	6
Canada	6
Netherlands	5
Japan	4
Switzerland	4
Sweden	3
Australia	2
Chile	2
Denmark	2
Mexico	2
Norway	2
Belgium	1
Ireland	1
New Zealand	1
Portugal	1
Spain	1
Thailand	1

6.2 Changes in the companies in the 2018 Benchmark

We added 43 new companies to the Benchmark and removed three companies, bringing the total to 150. The new companies are shown in Table 4.

Table 4: New companies in 2018

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

These additional companies were selected based on the following factors:

- The company's scale (in terms of revenue and market size).
- The size of the company's footprint (in terms of the number of animals affected).
- The company's significance within the industry sectors covered by the Benchmark (e.g. whether the company is seen as a useful comparator for other companies within the sub-sector, whether it has the potential to influence or drive the sector).
- The company's country of origin or listing. For the 2018 Benchmark, we were particularly keen to extend our coverage of North and South American companies and to extend our coverage of companies in South East Asia.
- Companies proposed by the BBFAW Partners, Compassion in World Farming and World Animal Protection, as well as by investors, existing BBFAW companies and other animal welfare NGOs.

Three companies were removed, two companies (El Corte Inglés, Olav Thon) on the basis of their animal footprint size and thus their limited potential to influence animal welfare in their operations). One company (Quick) was removed on the basis of a corporate event/takeover (Quick is now owned by Burger King France, a subsidiary of Restaurant Brands International).

Appendices



Appendix 1

2018 Benchmark questions and scoring

Management Commitment and Policy

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

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

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

Explanatory Notes:

- This question was looking for an acknowledgement by the parent company that farm animal welfare is a business issue.
- Companies that published a farm animal welfare policy or statement, even if that did not explain why farm animal welfare was a relevant issue for the business, were awarded the maximum points.
- Companies that acknowledged farm animal welfare as a business issue and/or set out the reasons why farm animal might be a business issue (e.g. because of public or customer concerns, security and sustainability of supply, cost) were awarded the maximum points.
- The score did not take account of the importance assigned by companies to farm animal welfare (e.g. relative to other corporate responsibility issues). The importance assigned by individual companies to farm animal welfare depends on factors such as the nature of their business, their existing management practices, the other business risks and priorities they need to manage, and their perceptions of customer and stakeholder pressure for action.
- The inclusion of farm animal welfare as an explicit subject in a Materiality Matrix, even if considered to be a low priority, was sufficient for points to be awarded for this question.

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

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

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

Explanatory Notes:

- The assessment did not differentiate between companies that published stand-alone farm animal welfare policies and companies that incorporated farm animal welfare into wider responsible sourcing or sustainability policies or codes of practice.
- Companies that published a clear statement of commitment to farm animal welfare and/or farm animal welfare-related principles that provided a starting point for the company's accountability to its stakeholders were awarded a score of 5 points.
- Policies issued by company subsidiaries were not considered as overarching policies, and companies with such policies but no overarching (i.e. at the parent company level) policy were therefore not awarded points for this question. These policies were also considered when deciding whether to award points for Questions 1 and 4-10.
- Policies focused on specific farm animal welfare issues (e.g. antibiotics where farm animal welfare is mentioned in passing) were not considered as overarching policies. Companies with such policies but no overarching policy on farm animal welfare were therefore not awarded points for this question. These policies were also considered when deciding whether to award points for Questions 1 and 4-10.
- Companies that supplemented these commitments or principles with details of how these were to be implemented were awarded a score of 10 points. To score maximum points, company farm animal welfare policies needed to include most/all of the following:
 - A clear statement of the reasons why farm animal welfare was important to the business (including both the business case and the ethical case for action)
 - A commitment to compliance with relevant legislation
 - A clear position with regard to expected standards of farm animal welfare
 - A description of the processes in place to ensure that the policy was effectively implemented (e.g. senior management oversight, commitments to continuous improvement, performance monitoring, corrective action in the event that the policy was not being effectively implemented)
 - A commitment to continuous improvement and public reporting on performance.

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

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

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

Explanatory Notes:

- This question was only scored if marks had been awarded for Question 2, i.e. when the company had a published farm animal welfare policy.
- The sub-questions on geography, species and products were scored separately (i.e. companies could score up to 5 points in each of the three sub-questions, and the scores for each sub-question did not influence the scores awarded for the other sub-questions).
- The question acknowledges that policies can vary from market to market, across species and across product ranges. Companies were given credit if they clearly specified the limits to the application of their farm animal welfare policies.
- In some cases, companies used terms such as 'all animals' or 'all products'. For the purposes of this assessment, we took this to mean that the policy had universal application (with respect to animals and products respectively) and companies received 5 points for these sub-questions. We asked companies to clarify the scope in order to keep receiving these points in future Benchmarks.
- For companies involved in or using the products from finfish aquaculture, we did not assume that the corporate farm animal welfare policy also applied to finfish (i.e. the policy had universal application) unless the company stated otherwise, or had a separate policy that applied to finfish. If it was unclear whether finfish were included, only 3 points were awarded for the species-part of the question.
- We defined finfish aquaculture as the breeding, rearing and harvesting of aquatic vertebrates (i.e. cold blooded animals with a bony or cartilaginous skeleton and a segmented spinal column) in all types of water environment enclosures, including ponds, rivers, lakes and the ocean.
- We did not consider policies for finfish that focused on conservation or sustainable fishing, unless there was an explicit reference to animal welfare within these.

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

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

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

Explanatory Notes:

- This question was looking for a clear position on the avoidance of close confinement.
- Simply stating compliance with legislation (e.g. with EU Directives referring to egg laying hens and sow stalls) was not treated as a proxy for having a clear position on the avoidance of close confinement. The reasons are (a) legislation, even in the EU, does not cover all close confinement practices, (b) a commitment to compliance with legislation does not provide guarantees on performance in countries where such legislation is absent. Companies that stated that they complied with legislation but did not have a formal policy on close confinement were, therefore, awarded zero points.

- Similarly, simply stating compliance with a farm assurance standard that prohibits close confinement was not treated as a proxy for having a clearly stated position, unless the commitment to avoidance was made explicit (e.g. compliance with the standard was presented as a way of delivering on its commitment to the avoidance of close confinement).
- Companies that made a commitment to the avoidance of close confinement but were not clear about the scope (in terms of geography, species, products) were awarded a score of 1 point.
- Companies that made a commitment to the avoidance of close confinement for a specific product or product range (e.g. using only free-range eggs) were awarded a score of 1 point (in contrast to a clear scope such as a cage-free policy for all own-brand products, for which 3 points were awarded).
- For the purposes of this question, sow stall free referred to the avoidance of confinement for individual sows during the gestation (pregnancy) period (i.e. it does not cover confinement for insemination and observation, or lactation). Within this definition, and in line with EU legislation, confinement of sows up to the first four weeks of pregnancy is permitted. Companies that did not permit any confinement or explicitly limited confinement to a maximum of the first four weeks of pregnancy were, subject to the other notes on this Question (i.e. depending on the scope of the commitment), awarded a score of 5 points.

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

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

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

Explanatory Notes:

- This question was looking for a clear position on the avoidance of products from farm animals subject to genetic engineering or cloning and/or their progeny or descendants.
- Simply stating compliance with legislation was not treated as a proxy for having a clear position on the avoidance of products from farm animals subject to genetic engineering or cloning and/or their progeny or descendants. The reasons are (a) legislation, even in the EU, does not cover all relevant issues, (b) a commitment to compliance with legislation does not provide guarantees on performance in countries where such legislation is absent. Companies that stated that they complied with legislation but did not have a formal policy were, therefore, awarded zero points.
- Similarly, simply stating compliance with a farm assurance standard that prohibits genetic modification was not treated as a proxy for having a clearly stated position unless the commitment to avoidance was made explicit (e.g. compliance with the standard was presented as a way of delivering on its commitment to the avoidance of genetically modified or cloned animals).
- Companies that made a commitment to the avoidance of products from farm animals subject to genetic engineering or cloning and/or their progeny or descendants but were not clear about the scope (in terms of geography, species, products) were awarded a score of 1 point.
- Companies that only referred to a specific genetic engineering technique (e.g. somatic cell nuclear transfer cloning), only received partial points.
- Companies that published general statements on the avoidance of products or ingredients subject to genetic engineering or cloning were not awarded points unless these statements explicitly referred to animals as a part of these products or ingredients. For example, we did not consider statements relating to genetically modified crops used in animal feed.
- We did not award points to companies that stated that they would not use products from farm animals subject to genetic engineering or cloning and/or their progeny or descendants so long as these were prohibited by legislation or opposed by consumers. That is, we were looking for unqualified rather than qualified commitments.

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

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

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

Explanatory Notes:

- This question was looking for a clear position on the avoidance of growth promoting substances which are typically used to increase the muscle (meat) or milk production of animals farmed for food. Examples include the hormone BST used to increase milk production (in dairy cattle), hormone feed additives in pig production (e.g. ractopamine) and low dose antibiotics.
- Simply stating compliance with legislation was not treated as a proxy for having a clear position on the avoidance of growth promoting substances. The reasons are (a) legislation, even in the EU, does not cover all relevant issues, (b) a commitment to compliance with legislation does not provide guarantees on performance in countries where such legislation is absent. Companies that stated that they complied with legislation but did not have a formal policy were, therefore, awarded zero points.
- Similarly, simply stating compliance with a farm assurance standard that prohibits the use of growth hormones was not treated as a proxy for having a clearly stated position unless the commitment to avoidance was made explicit (e.g. compliance with the standard was presented as a way of delivering on its commitment to the avoidance of growth promoting substances).
- Companies that stated that they avoided the use of antibiotics as preventative measures but did not explicitly prohibit their use as growth promoters were not awarded points for this question.
- Companies with a stated target to reduce the level of growth promoting substances (rather than avoidance) were not awarded points for this question (although they may have scored points for Question 12 if the target/objective had a clear link to farm animal welfare).
- Companies that stated compliance with legislation or guidance on eliminating (human) medically important antibiotics used as growth promoters, were not awarded points as we are looking for a clear position on the avoidance of all growth promoting substances.
- In the absence of a clear position on the avoidance of growth promoting substances, companies that marketed a particular product line as containing zero growth hormones were not awarded any points. The rationale for this is because a) this question is looking for a clear commitment from the company on the avoidance of growth promoting substances, rather than evidence of selected products that avoid certain substances, b) the question applies to all growth promoting substances (i.e. not just hormones); and c) in certain jurisdictions (e.g. the US), it is illegal to administer steroid growth hormones to poultry and pigs (so, if a poultry or pig product states that the animals are not fed hormones, the product is simply complying with legislation).

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

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

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

- Simply stating compliance with legislation was not treated as a proxy for having a clear position on the reduction or avoidance of antibiotics for prophylactic use.
- Similarly, simply stating compliance with a farm assurance standard that prohibits or restricts antibiotic use was not treated as a proxy for having a clearly stated position, unless the commitment to reduction or avoidance of antibiotic use was made explicit (e.g. compliance with the standard was presented as a way of delivering on its commitment to the reduction or avoidance of antibiotic use).
- Companies that only included (human) medically important antibiotics in their policies were only awarded partial points.
- In the absence of a clear position on the avoidance of antibiotics, companies that marketed a particular product line as antibiotic-free were not awarded any points. The rationale is that this question is looking for a clear commitment from the company on the reduction or avoidance of antibiotics, rather than evidence of selected products that avoid certain substances.
- Any commitment to reducing or avoiding routine antibiotics should be accompanied by an explanation of the actions to be taken to improve the conditions (e.g. stocking densities) in which the animals are reared.

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

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

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

(Max Score 5)

Explanatory Notes:

- This question was looking for a clear position on the avoidance of routine mutilations.
- Simply stating compliance with legislation was not treated as a proxy for having a clear position on the avoidance of routine mutilations. The reasons are (a) legislation does not cover all routine mutilations, (b) a commitment to compliance with legislation does not provide guarantees on performance in countries where such legislation is absent. Companies that stated that they complied with legislation but did not have a formal policy on the avoidance of routine mutilations were, therefore, awarded zero points.
- Similarly, simply stating compliance with a farm assurance standard that prohibits routine mutilations was not treated as a proxy for having a clearly stated position unless the commitment to avoidance was made explicit (e.g. compliance with the standard was presented as a way of delivering on its commitment to the avoidance of routine mutilations).
- Companies that made a commitment to the avoidance of routine mutilations but were not clear about the scope (in terms of geography, species, products) were awarded a score of 1 point.
- Companies that specified certain breeds (e.g. genetically polled cattle) in their supplier guidelines but did not have a clear position on the avoidance of routine mutilations were not awarded any points.
- Companies that specified immuno-castration as an alternative to surgical castration were awarded zero points, because this question is looking for the universal avoidance of castration (in any form).

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

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

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

(Max Score 5)

Explanatory Notes:

- This question was looking for a clear commitment to the use of stunning (typically using controlled atmosphere stunning or electrical stunning methods) to render animals unconscious immediately prior to slaughter (or rendered insensible in the case of finfish).
- Simply stating compliance with legislation was not treated as a proxy for having a clear commitment to pre-slaughter stunning. The reasons are (a) legislation may not be comprehensive, (b) a commitment to compliance with legislation does not provide guarantees on performance in countries where such legislation is absent. Companies that stated that they complied with legislation but did not have a formal policy were, therefore, awarded zero points.
- Similarly, simply stating compliance with a farm assurance standard that requires pre-slaughter stunning was not treated as a proxy for having a clearly stated position, unless the commitment to avoidance was made explicit (e.g. compliance with the standard was presented as a way of delivering on its commitment to the avoidance of meat from animals that have not been subjected to pre-slaughter stunning).
- Companies that made a commitment to pre-slaughter stunning but were not clear about the scope (in terms of geography, species, products) were awarded a score of 1 point.
- Companies that described the actions taken (e.g. the installation of CCTV in abattoirs) but did not make a formal policy commitment to pre-slaughter stunning were awarded a score of zero points for this question.
- Most developed and many developing countries have legislation that requires pre-slaughter stunning. However, exceptions are made which permit some religious communities to slaughter without pre-stunning, e.g. slaughter by the Jewish method (Shechita) or by the Muslim method (Halal). Companies that made exceptions to requirements for pre-slaughter stunning to account for religious concerns were awarded 3 points, so long as the scope of the exception was clearly defined.

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

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

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

(Max Score 5)

Explanatory Notes:

- This question was looking for a clear commitment to the avoidance of long distance live transportation, where long distance was defined as eight hours or more from loading to unloading.
- Simply stating compliance with legislation was not treated as a proxy for having a clear commitment to the avoidance of long distance live transportation. The reasons are (a) legislation may not be comprehensive, (b) a commitment to compliance with legislation does not provide guarantees on performance in countries where such legislation is absent. Companies that stated that they complied with legislation but did not have a formal policy were, therefore, awarded zero points.
- Similarly, simply stating compliance with a farm assurance standard that imposes limits on transportation times was not treated as a proxy for having a clearly stated position, unless the commitment to avoidance was made explicit (e.g. compliance with the standard was presented as a way of delivering on its commitment to the avoidance of long-distance transport) and the maximum journey time was specified.
- Companies that stated that transport distances are low (e.g. because of local sourcing, or the geographic boundaries of the areas where they operate), or those that stated distances in km, were not considered to have made a policy commitment to the avoidance of long distance live transport.
- Companies that made a commitment to the avoidance of long distance live transportation but were not clear about the scope (in terms of geography, species, products) were awarded a score of 1 point.

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

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

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

(Max Score 10)

Explanatory Notes:

- The two sub-questions were scored separately (i.e. companies could score 5 points for publishing details of who was responsible for farm animal welfare on a day-to-day basis and 5 points for publishing details of senior management responsibility for overseeing the farm animal welfare policy).
- For the purposes of scoring on day-to-day responsibility, the question was not looking for named individuals, but evidence of roles with responsibility for farm animal welfare (e.g. a statement that this was the responsibility of a dedicated technical or sourcing manager, or a statement that responsibility was divided among a number of functions, with information on the various roles and responsibilities).
- For the management oversight sub-question, we recognised that companies may assign responsibility to a named senior person or that farm animal welfare may form part of the remit of a wider sustainability, CSR or sourcing committee. Therefore, 5 points were awarded if the company provided a clear account of board or senior management oversight.
- For the purposes of scoring, the emphasis was on the management of farm animal welfare. General information on the management or oversight of CSR or sustainability was only credited if it was clear that farm animal welfare was an integral part of the management or oversight (as relevant to the sub-questions) of CSR or sustainability.

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

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

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

(Max Score 10)

Explanatory Notes:

- This question was looking for evidence of explicit farm animal welfare-related targets, and for evidence that the company had a clear plan for achieving these targets.
- We did not award points for objectives and targets adopted for other purposes (e.g. quality), unless improving farm animal welfare was an explicit aim of these objectives and targets.
- For the purposes of scoring, we did not differentiate between process (e.g. to formalise their farm animal welfare management systems, to introduce audits) and performance (e.g. to phase out specific non-humane practices, to ensure that specific standards are met for all species) targets.
- Companies with multiple targets and objectives, but without further information on how these were to be achieved, were awarded 5 points.
- Companies were awarded maximum points if they provided information on how the targets were to be achieved, e.g. by specifying the main actions to be taken, by indicating the financial and other resources required.

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

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

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

(Max Score 10)

Explanatory Notes:

- The sub-questions (on policy, objectives and targets, and progress) were scored independently (i.e. the scores for each sub-question did not influence the scores on the other sub-questions).
- The policy sub-question was only assessed if points had been awarded for Question 2, i.e. the company had published a farm animal welfare policy. Otherwise, zero points were awarded for this part of the question.
- The objectives and targets sub-question was only assessed if the company had been awarded 5 or 10 points for Question 12, i.e. the company had published objectives and targets. Otherwise, a score of zero was awarded for this part of the question.

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

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

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

(Max Score 10)

Explanatory Notes:

- The sub-questions (on training and on internal controls) were scored independently (i.e. the scores for each sub-question did not influence the scores for the other sub-questions).
- On training, companies were only awarded 5 points if the training provided was aimed at employees and if it explicitly addressed farm animal welfare-related issues.
- The training question did not address the quality of the training provided, the manner in which skills or competencies were assessed, the number of employees receiving training or the number of hours of training provided.
- On internal controls, companies were only awarded 5 points if they explicitly discussed the actions that they take in relation to employee and/or supplier non-compliance with their farm animal welfare policy, e.g. when audit failures are identified. A number of the companies reviewed described their internal controls in relation to CSR or product quality-related policies. However, unless it was clear that these policies and processes also covered farm animal welfare, companies scored zero for this sub-question.

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

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

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

(Max Score 15)

Explanatory Notes:

- The sub-questions (on contracts, auditing and supplier education) were scored independently (i.e. the scores for each sub-question did not influence the scores for the other sub-questions).
- On contracts, companies were awarded 3 points if they indicated that they included farm animal welfare in contracts but did not indicate whether this applied to all relevant contracts or if they indicated that farm animal welfare was not included in all contracts.
- On auditing, companies were only awarded 5 points if it was clear that their auditing processes explicitly covered farm animal welfare. Many of the companies reviewed reported that they audited their suppliers against safety and/or quality standards but, unless it was clear that these audit processes covered farm animal welfare, companies scored zero for this sub-question.
- On supplier support and/or education, 5 points were awarded to companies that published case studies or examples and/or provided a more comprehensive description of their approach. The award of 5 points was not dependent on the number or proportion of suppliers receiving this support and/or education. A number of the companies described their support to suppliers on a range of supply chain issues. However, unless it was clear that this support also covered farm animal welfare, companies scored zero for this sub-question.

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

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

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

Explanatory Notes:

- Assurance standards vary from country to country and are either welfare-specific or include welfare dimensions as part of a wider (e.g. quality) assurance framework.
- Basic farm assurance standards typically do not go beyond legislative requirements for welfare and so contribute relatively little to enhanced welfare. In general, these involve yearly inspections by an independent body.
- Farming systems that provide for behavioural freedom without compromising health can be described as having higher welfare potential. In general, schemes with an animal welfare focus require system inputs which offer a higher welfare potential. They may also include more detailed welfare outcome measures and more frequent or detailed inspections than basic farm assurance standards.
- Examples of basic assurance schemes that were scored in the assessment included: the Red Tractor Farm Assurance Schemes, American Humane Certified, BEIC Lion Quality, Viande de Porc Française, Certification de Conformité de Produits, and Best Aquaculture Practice (BAP) Standards.
- Examples of higher welfare schemes that were scored in the assessment included: Soil Association organic standards, Animal Welfare Approved, RSPCA Assured, Beter Leven, Certified Humane, KRAV, Label Rouge, Neuland, GAP 5-Step (for certain species).
- Where companies reported on performance by reference to their own internal standards, for points to be awarded we needed either (a) a clear description of how the company standard compared to basic or higher assurance standards (such as those listed above) or (b) sufficient information to be provided in order for the assessor to make an assessment.
- Companies that reported on performance by reference to the proportion of products audited but without specifying whether these were to basic or higher farm assurance standards were awarded 3 points.
- There are a number of schemes which claim to incorporate animal welfare components but are, in fact, designed to assure quality or safety standards. In these instances, it is not always clear what standards, if any, of farm animal welfare are expected. Companies that described their performance against these sorts of standards generally did not receive points unless there was a clear description of the farm animal welfare elements of such standards (e.g. GlobalG.A.P.).
- Retailers could only score maximum points if all their products (own-brand and other) were assured to higher level welfare standards.

Innovation and Leadership

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

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

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

(Max Score 10)

Explanatory Notes:

- The sub-questions (on research and development and industry initiatives) were scored independently (i.e. the scores for each sub-question did not influence the scores on the other sub-questions).
- Companies that reported on their involvement in initiatives or programmes to improve farming techniques on environmental, safety or quality grounds, for example, were not awarded a score unless there was a clearly defined farm animal welfare element to these initiatives.
- Similarly, only those industry initiatives that were explicitly directed at improving farm animal welfare were eligible to be scored.
- In order to receive a score of 5 points for either sub-question, it was necessary for companies to demonstrate not only that the initiatives had a meaningful farm animal welfare dimension but that the company had played a significant role in the initiative. That is, companies had to demonstrate that they were dedicating significant time, resources or expertise to the initiatives in question. For example, it was not sufficient simply to say that the company had attended roundtables or working groups with industry peers. However, if a company had initiated or become a founding member of an initiative aimed at advancing farm animal welfare, a score of 5 points would have been awarded.

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

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

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

(Max Score 10)

Explanatory Notes:

- Only awards that (a) explicitly focused on farm animal welfare, (b) were offered by credible animal welfare organisations, consumer associations or industry and farming bodies, and (c) involved a focus on farm animal welfare achievements were considered.
- Awards/commendations from business partners (or other organisations where a commercial relationship exists) were not counted for scoring purposes because of concerns that these commercial links may play a role in the assessment process.
- Companies were able to score ten points if they received multiple awards from a single awarding organisation (e.g. from the Humane Society, from Compassion in World Farming) provided that these awards related to different species or production systems.
- Awards made prior to 2016 were not counted for scoring purposes (i.e. only awards received in the 2 years prior to the assessment were considered).
- To be considered for scoring, awards needed to be publicly acknowledged by the company. In a number of cases, we identified companies that had received farm animal welfare-related awards but did not have any information on these awards on their websites.

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)	

Explanatory Notes:

- The activities that could be considered in this question were defined broadly. Examples included:
 - The provision of farm animal welfare information on the company's website. Note: This is not just about providing information in the corporate responsibility section of the website but making farm animal welfare an integral part of customer communications and engagement.
 - On-pack or on-shelf labelling – provided this was evidenced on the company's website, in its published reports or on social media platforms.
 - Information leaflets or information packs.
 - Media promotions.
 - Supporting third party campaigns or programmes e.g. the RSPCA Farm Animal Week.
 - Customer farm visits, seminars or roundtables.
 - Social media campaigns.
- In order to receive a score of 5 or 10, the focus had to be on farm animal welfare.
- Initiatives aimed at showing how products are sourced or produced but without an explicit focus on the welfare of farm animals, were not scored in the assessment.
- Companies that produced multiple consumer-facing videos on farm welfare issues were awarded five points, unless it was clear that these were linked to separate consumer engagement programmes or themes.
- Companies were only awarded maximum points where there was clear evidence of multiple platforms or channels used to promote higher animal welfare to consumers.
- Social media channels were not separately reviewed, so companies had to link to these channels from their webpages in order to receive points (e.g. for YouTube videos).

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

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

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

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

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

Q20c. If yes:

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

Welfare benefits to animals	<input type="checkbox"/>
Human health and nutritional benefits	<input type="checkbox"/>
Environmental benefits	<input type="checkbox"/>
Wildlife benefits	<input type="checkbox"/>
Population benefits	<input type="checkbox"/>
Cost benefits	<input type="checkbox"/>
(Max Score 0)	

Explanatory Notes:

- As this was a new question, companies did not receive points for information.
- As this question was included for the purposes of developing a baseline understanding of corporate practice, we did not specify assessment criteria. We asked assessors to identify companies who provided information that might be useful to understanding the company's approach to protein diversification.

Performance Reporting and Impact

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

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

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

Explanatory Notes:

- This question was looking specifically for explicit reporting on the proportion of animals that are free from close confinement. Companies that reported using proxy measures (e.g. the proportion of animals managed to certain farm animal welfare standards) were not awarded points unless they explicitly stated that the standard meant that the relevant animals were free from close confinement.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed were not awarded points.
- Companies that made general statements about "Our animals" or "All animals" being free from close confinement were not awarded points unless they could demonstrate that these statements were supported by monitoring data.

Q22. Does the company report on the proportion of animals for own-brand products in its global supply chain that is free from routine mutilations (i.e. castration, teeth clipping, tail docking, toe clipping, dehorning, desnooding, 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 are free from routine mutilations	0
The company reports on the proportion of animals that are free from routine mutilations, but this reporting is limited to certain geographies, species or own-brand products.	3
The company reports fully on the proportion of animals that are free from routine mutilations, covering all relevant geographies, species and own-brand products.	5
(Max Score 5)	

Explanatory Notes:

- This question was looking specifically for explicit reporting on the proportion of animals that are free from routine mutilations. Companies that reported using proxy measures (e.g. the proportion of animals managed to certain farm animal welfare standards) were not awarded points unless they explicitly stated that the standard meant that the relevant animals were free from routine mutilations.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed were not awarded points.
- Companies that made general statements about "Our animals" or "All animals" being free from routine mutilations were not awarded points unless they could demonstrate that these statements were supported by monitoring data.
- Companies that reported on the use of anaesthesia or analgesics in association with routine mutilations were not awarded points because this question is looking for an explicit commitment to the avoidance of routine mutilations.

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

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

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

Explanatory Notes:

- This question was looking specifically for explicit reporting on the proportion of animals that are subject to pre-slaughter stunning. Companies that reported using proxy measures (e.g. the proportion of animals managed to certain farm animal welfare standards) were not awarded points unless they explicitly stated that the standard meant that the relevant animals were subject to pre-slaughter stunning.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed were not awarded points.
- Companies that made general statements about "Our animals" or "All animals" being subject to pre-slaughter stunning were not awarded points unless they could demonstrate that these statements were supported by monitoring data.

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

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

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

Explanatory Notes:

- This question was looking specifically for explicit reporting on the average, typical or maximum live transport times for animals. Companies that reported using proxy measures (e.g. the proportion of animals managed to certain farm animal welfare standards) were not awarded points unless they explicitly stated that the standard meant that the transport times were limited to eight hours or less.
- Points were only awarded if the company was explicit about the average, typical or maximum transport times for animals affected. Companies that reported on the average, typical or maximum distance travelled by animals without specifying transport times were not awarded points.
- Companies that made general statements about "Our animals" or "All animals" being subject to average, typical or maximum journey times were not awarded points unless they could demonstrate that these statements were supported by monitoring data.
- Companies that reported on measures taken to the comfort of animals during transportation (e.g. stocking levels, access to water, rest breaks, etc.) were not awarded points as this question is looking explicitly at journey times for animals.

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

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

WOMs might include for example:

For all species: mortality rates

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

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

For pigs: lameness, tail bite and other lesions

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

For beef: body condition, lameness

For rabbits: foot lesions, fur coverage, eye condition

For fish: fin and body damage

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

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

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

For slaughter: effectiveness of stunning

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

Explanatory Notes:

- This question was looking specifically for explicit reporting on welfare outcome measures such as:
 - Mortality rates (as an indicator of potential pain, suffering and suboptimal performance).
 - Bone breakages (as an indicator of pain, suffering, suboptimal performance, and poor house design).
 - Lameness (as an indicator of potential pain, behavioural restriction and suboptimal environmental and housing conditions).
 - Body marks/injuries (as an indicator of aggressive fight damage, especially during mixing or competition at feeding, or from sexual behaviours).
 - Body condition (as an indicator of good feed management, or competition at feeding).
 - Cleanliness (as an indicator of good environmental control, thermal comfort).
 - Positive flock or herd behaviour (as an indicator of a varied stimulating environment, good management and suitable breed for production system).
 - Negative flock or herd behaviour, such as injurious feather pecking or tail biting in pigs (as a signpost of a barren non-stimulating environment, poor environmental control, low space allowance, feed and health problems).
- Scores were not awarded for reporting on input-based measures (i.e. measures relating to the type of production system, e.g. caged, barn, free-range, as well as to the practices for transport and slaughter).
- 'Relevant' means all species that are in the company's supply chain.
- Points were also not awarded for production measures (e.g. egg output).
- Similarly, scores were not awarded for companies that reported on the proportion of animals managed according to particular farm animal welfare standards, but did not report on the welfare outcomes resulting from the implementation of these standards.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed were not awarded points.

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

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

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

Explanatory Notes:

- Because performance reporting is relatively underdeveloped, we did not prescribe the performance indicators to be used. We awarded scores for input-based measures (i.e. measures relating to the type of production system, e.g. caged, barn, free-range, and environmental enrichment, as well as the practices for transport and slaughter) and outcome-based measures (which are indicators that relate to the physical and mental wellbeing of the animals themselves, e.g. lameness and mastitis in dairy cows, gait score and footpad dermatitis in broilers, tail-biting and lameness in pigs, bone breakage and feather coverage in laying hens).
- We did not prescribe the form in which performance data were reported. We awarded scores for reporting in absolute (e.g. number of animals) and relative (e.g. as a percentage of the total number of animals, as a proportion of the species in question) terms.
- 'Relevant' means all species that are in the company's supply chain.
- We did not award points if the company used terms such as 'improved' or 'decreased' but did not provide a precise definition (e.g. a number, a rate) for these terms.

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

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

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

Explanatory Notes:

- This question was only assessed for those companies that produce, use or sell eggs or egg-based products.
- This question was looking specifically for reporting on the proportion of shell eggs or eggs as ingredients in the company's global supply chain that was sourced from laying hens that are cage-free.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed globally were awarded 1 point.
- Companies that reported on the proportion of laying hens that are cage-free but limited their reporting to specified products and/or geographies were awarded 1 point.
- Similarly, if the scope of reported figures was unclear, companies were awarded 1 point.
- Scores were not awarded for companies that reported on the proportion of animals managed according to particular higher welfare or organic standards, but did not explicitly report on the proportion of laying hens that are cage-free in line with these standards.
- Companies that made general statements about "Our animals" or "All animals" being free from close confinement were not awarded points unless there was explicit reporting on the proportion of laying hens that are cage-free.
- In situations where companies reported performance data for different regions, countries or products but did not specify the relative proportion of global supply represented by these regions, countries or products, the lowest number reported was applied (e.g. if a company, with operations in three countries, reported that 14% its laying hens in Country A, 47% in Country B and 100% in Country C were cage free but did not provide any information on the proportion of its laying hens that were in each of these countries, 14% would be used as the basis for calculating its score for this question).
- For retailers, the scope of this question is limited to own-brand products.

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

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

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

(Max Weighted Score 1.25 – 5*)

Explanatory Notes:

- This question was only assessed for those companies that produce, use or sell pork or pork-based products.
- This question was looking specifically for reporting on the proportion of fresh/frozen pork products and ingredients in the company's global supply chain that was sourced from pigs that are free from sow stalls.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed globally were awarded 1 point.
- Companies that reported on the proportion of sows that are free from sow stalls but limited their reporting to specified products and/or geographies were awarded 1 point.
- Similarly, if the scope of reported figures was unclear, companies were awarded 1 point.
- Scores were not awarded for companies that reported on the proportion of animals managed according to particular higher welfare or organic standards, but did not explicitly report on the proportion of sows that are free from sow stalls in line with these standards.
- Companies that made general statements about "Our sows" or "All sows" being free from sow stalls were not awarded points unless there was explicit reporting on the proportion of sows that are free from sow stalls.
- In situations where companies reported performance data for different regions, countries or products but did not specify the relative proportion of global supply represented by these regions, countries or products, the lowest number reported was applied (e.g. if a company with operations in 3 countries reported that 14% of sows in Country A, 47% in Country B and 100% in Country C were free from sow stalls but did not provide any information on the proportion of its sows that were in each of these countries, 14% would be used as the basis for calculating its score for this question).
- For retailers, the scope of this question is limited to own-brand products.

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

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

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

(Max Weighted Score 1.25 – 5*)

Explanatory Notes:

- This question was only assessed for those companies that produce, use or sell dairy-based products.
- This question was looking specifically for reporting on the proportion of milk or milk products and ingredients in the company's global supply chain that was sourced from dairy cows that are free from tethering.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed globally were awarded 1 point.
- Companies that reported on the proportion of cows that are free from tethering but limited their reporting to specified products and/or geographies were awarded 1 point.
- Similarly, if the scope of reported figures was unclear, companies were awarded 1 point.

- Scores were not awarded for companies that reported on the proportion of animals managed according to particular farm assurance standards, but did not explicitly report on the proportion of dairy cows that are free from tethering in line with these standards.
- Companies that made general statements about “Our dairy cows” or “All cows” being free from tethering were not awarded points unless there was explicit reporting on the proportion of dairy cows that are free from tethering.
- In situations where companies reported performance data for different regions, countries or products but did not specify the relative proportion of global supply represented by these regions, countries or products, the lowest number reported was applied (e.g. if a company with operations in three countries reported that 14% of its dairy cows in Country A, 47% in Country B and 100% in Country C were free from tethering but did not provide any information on the proportion of its dairy cows that were in each of these countries, 14% would be used as the basis for calculating its score for this question).
- For retailers, the scope of this question is limited to own-brand products.

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

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

0% of broiler chickens reared at lower stocking densities, or no reported information	0
1 – 25% of broiler chickens are reared at lower stocking densities	1
26 – 50% of broiler chickens are reared at lower stocking densities	3
51 – 75% of broiler chickens are reared at lower stocking densities	5
76 – 99% of broiler chickens are reared at lower stocking densities	7
100% of broiler chickens are reared at lower stocking densities	10
(Max Weighted Score 1.25 – 5*)	

Explanatory Notes:

- This question was only assessed for those companies that produce, use or sell chicken or chicken-based products.
- This question was looking specifically for reporting on the proportion of broiler meat in the company's global supply chain that was sourced from broiler chickens that are reared at lower stocking densities.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed globally were awarded 1 point.
- Companies that reported on the proportion of broiler chickens that are reared at lower stocking densities but limited their reporting to specified products and/or geographies were awarded 1 point.
- Similarly, if the scope of reported figures was unclear, companies were awarded 1 point.
- Scores were not awarded for companies that reported on the proportion of animals managed according to particular farm assurance standards, but did not explicitly report on the proportion of broiler chickens that are reared at lower stocking densities in line with these standards.
- Companies that made general statements about “Our broiler chickens” or “All meat chickens” being reared at lower stocking densities were not awarded points unless there was explicit reporting on the proportion of broiler chickens that are reared at lower stocking densities.
- In situations where companies reported performance data for different regions, countries or products but did not specify the relative proportion of global supply represented by these regions, countries or products, the lowest number reported was applied (e.g. if a company with operations in 3 countries reported that 14% of its broiler chickens in Country A, 47% in Country B and 100% in Country C were reared at lower stocking densities but did not provide any information on the proportion of its broiler chickens that were in each of these countries, 14% would be used as the basis for calculating its score for this question).
- For retailers, the scope of this question is limited to own-brand products.

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

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

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

(Max Weighted Score 1.66 – 5*)

Explanatory Notes:

- This question was only assessed for those companies that produce, use or sell eggs or egg-based products.
- This question was looking specifically for reporting on the proportion of shell eggs or eggs as ingredients in the company's global supply chain that was sourced from laying hens that were free from beak trimming or tipping.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed globally were awarded 1 point.
- Companies that reported on the proportion of laying hens that are free from beak trimming or tipping but limited their reporting to specified products and/or geographies were awarded 1 point.
- Similarly, if the scope of reported figures was unclear, companies were awarded 1 point.
- Scores were not awarded for companies that reported on the proportion of animals managed according to particular farm assurance standards, but did not explicitly report on the proportion of laying hens that are free from beak trimming or tipping in line with these standards.
- Companies that made general statements about "Our laying hens" or "All chickens" being free from beak trimming or tipping were not awarded points unless there was explicit reporting on the proportion of laying hens that are free from beak trimming or tipping.
- In situations where companies reported performance data for different regions, countries or products but did not specify the relative proportion of global supply represented by these regions, countries or products, the lowest number reported was applied (e.g. if a company with operations in 3 countries reported that 14% of its laying hens in Country A, 47% in Country B and 100% in Country C were free from beak trimming but did not provide any information on the proportion of its laying hens that were in each of these countries, 14% would be used as the basis for calculating its score for this question).
- For retailers, the scope of this question is limited to own-brand products.

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

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

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

(Max Weighted Score 1.66 – 5*)

Explanatory Notes:

- This question was only assessed for those companies that produce, use or sell pork or pork-based products.
- This question was looking specifically for reporting on the proportion of fresh/frozen pork products and ingredients in the company's global supply chain that was sourced from pigs that are free from tail docking.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed globally were awarded 1 point.
- Companies that reported on the proportion of pigs that are free from tail docking but limited their reporting to specified products and/or geographies were awarded 1 point.
- Similarly, if the scope of reported figures was unclear, companies were awarded 1 point.
- Scores were not awarded for companies that reported on the proportion of animals managed according to particular farm assurance standards, but did not explicitly report on the proportion of pigs that are free from tail docking in line with these standards.

- Companies that made general statements about "Our pigs" or "All pigs" being free from tail docking were not awarded points unless there was explicit reporting on the proportion of pigs that are free from tail docking.
- In situations where companies reported performance data for different regions, countries or products but did not specify the relative proportion of global supply represented by these regions, countries or products, the lowest number reported was applied (e.g. if a company with operations in 3 countries reported that 14% of its pigs in Country A, 47% in Country B and 100% in Country C were free from tail docking but did not provide any information on the proportion of its pigs that were in each of these countries, 14% would be used as the basis for calculating its score for this question).
- For retailers, the scope of this question is limited to own-brand products.

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

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

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

Explanatory Notes:

- This question was only assessed for those companies that produce, use or sell dairy or dairy-based products.
- This question was looking specifically for reporting on the proportion of fresh/frozen milk products and ingredients in the company's global supply chain that was sourced from dairy cows that are free from tail docking.
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed globally were awarded 1 point.
- Companies that reported on the proportion of dairy cows that was free from tail docking but limited their reporting to specified products and/or geographies were awarded 1 point.
- Similarly, if the scope of reported figures was unclear, companies were awarded 1 point.
- Scores were not awarded for companies that reported on the proportion of animals managed according to particular farm assurance standards, but did not explicitly report on the proportion of dairy cows that are free from tail docking in line with these standards.
- Companies that made general statements about "Our dairy cows" or "All dairy cows" being free from tail docking were not awarded points unless there was explicit reporting on the proportion of cows that are free from tail docking.
- In situations where companies reported performance data for different regions, countries or products but did not specify the relative proportion of global supply represented by these regions, countries or products, the lowest number reported was applied (e.g. if a company with operations in 3 countries reported that 14% of its cows in Country A, 47% in Country B and 100% in Country C were free from tail docking but did not provide any information on the proportion of its cows that were in each of these countries, 14% would be used as the basis for calculating its score for this question).
- For retailers, the scope of this question is limited to own-brand products.

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

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

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

Explanatory Notes:

- This question was looking specifically for reporting on the proportion of animals in the company's global supply chain that had been pre-slaughter stunned.

- The question applied to all products (own-brand and other).
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed globally were awarded 1 point.
- Companies that reported on the proportion of animals that have been pre-slaughter stunned but limited their reporting to specified products and/or geographies were awarded 1 point.
- Similarly, if the scope of reported figures was unclear, companies were awarded 1 point.
- Scores were not awarded for companies that reported on the proportion of animals managed according to particular farm assurance standards, but did not explicitly report on the proportion of animals that have been pre-slaughter stunned in line with these standards.
- In situations where companies reported performance data for different regions, countries or products but did not specify the relative proportion of global supply represented by these regions, countries or products, the lowest number reported was applied (e.g. if a company with operations in 3 countries reported that 14% of its animals in Country A, 47% in Country B and 100% in Country C were pre-slaughter stunned but did not provide any information on the proportion of the animals that were in each of these countries, 14% would be used as the basis for calculating its score for this question).
- Companies that made general statements about "Our animals" or "All animals" being pre-slaughter stunned were not awarded points unless there was explicit reporting on the proportion of animals that have been pre-slaughter stunned.

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

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

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

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

(Max Score 10)

Explanatory Notes:

- This question was looking specifically for reporting on the proportion of animals in the company's global supply chain that are transported in 8 hours or less.
- The question applied to all products (own-brand and other).
- Points were only awarded if the company was explicit about the proportion of animals affected. Companies that reported on the total number of animals affected but did not put this number into context of the total number of animals used or processed globally were awarded 1 point.
- Companies that reported on the proportion of animals that are transported in 8 hours or less but limited their reporting to specified products and/or geographies were awarded 1 point.
- Similarly, if the scope of reported figures was unclear, companies were awarded 1 point.
- Scores were not awarded for companies that reported on the proportion of animals managed according to particular farm assurance standards, but did not explicitly report on the proportion of animals that are transported in 8 hours or less in line with these standards.
- In situations where companies reported performance data for different regions, countries or products but did not specify the relative proportion of global supply represented by these regions, countries or products, the lowest number reported was applied (e.g. if a company with operations in 3 countries reported that 14% of its animals in Country A, 47% in Country B and 100% in Country C were transported for 8 hours or less, but did not provide any information on the proportion of the animals that were in each of these countries, 14% would be used as the basis for calculating its score for this question).
- Companies that made general statements about "Our animals" or "All animals" were not awarded points unless there was explicit reporting on the proportion of animals that are transported in 8 hours or less.

*Notes

1. For questions 27–30, 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 the scores to calculate the overall average for these relevant questions.
2. For questions 31–33, 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 the scores to calculate the overall average for these relevant questions.

Appendix 2

2018 Benchmark companies

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

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

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

Appendix 3

Glossary

Androsterone – an androgenous steroid hormone and pheromone formed in the testes from the breakdown of progesterone, excreted in the urine and plasma of entire (i.e. non-castrated) male pigs, and responsible for boar taint and unpleasant odour/taste to meat

Animal welfare – the physical and mental wellbeing of animals and the freedom to express behaviours that are important to them; the Farm Animal Welfare Council adopted the Five Freedoms (see below) to demonstrate the attributes of good animal welfare

Basic farm assurance – certification schemes that ensure certain standards of safety and quality are met (on-farm), often including some animal welfare standards similar to the legislative requirements of the market(s) in which they operate

Barren battery cage (or: conventional cage) – a cage used to house several laying hens, usually providing space equivalent to less than an A4 sheet of paper per hen; provision is limited to food and water; barren battery cages are prohibited by EU legislation although they are common in other parts of the world

Battery caged hens – hens housed in barren battery cages

Beak trimming – removal of part of the beak (laying hens, parent broilers and turkeys) using a hot blade, secateurs or an infra-red beam. Infra-red is the only method permitted in England; in the EU no more than a third of the beak may be removed

Broiler chickens – chickens reared for meat

Castration – by scrotal incision, removal of the testes that are cut or torn at the spermatic cord (pigs, cattle), using a rubber ring or bloodless castration method (sheep, cattle). Generally done without anaesthetic or post-procedural pain relief

Cephalosporins – medicines that kill bacteria or prevent their growth. Cephalosporins are a newer class of antibiotics and are often seen as an alternative to penicillin

Cloning – the process of producing genetically identical individuals using donor DNA and a surrogate mother. In farm animals, cloning may be used to create copies of high-yielding animals for breeding whose progeny may then be used in food production. The majority of cloning is performed with cattle, but pigs, goats and sheep have also been subject to the procedure. Animal welfare concerns associated with cloning include risks associated with the surgical procedures undergone by the donor and surrogate animals, high rates of pregnancy loss and juvenile deaths, birth complications, and potential loss of genetic diversity

Close confinement – provision of very limited space, representing inadequate space to allow an animal to move around or express normal patterns of behaviour

Coccidiostat – a pharmaceutical agent that acts upon Coccidia parasites commonly found in animal intestines

Concentrated animal feeding operations (CAFOs) – also known as a factory farm, a CAFO is a production process for meat or dairy that confines many cattle at high stocking densities. The animals have very little room to move and the land is bare of vegetation so, instead of grazing, feed is brought to the animals

Disbudding – removal of the horn buds in young animals (calves, kids) using a hot iron or chemical cauterisation

Dehorning – removal of the horns of adult animals by cutting or sawing

Desnooding – removal of the snood of a turkey, the fleshy part hanging from the forehead and over the beak

Dry sows – sows in the herd other than those during the period of farrowing (giving birth) and lactation (this includes pregnant sow and sows awaiting impregnation)

Farm animal welfare – see animal welfare, where farmed animals refer to those animals reared for food, fibres and other commodities

Farrowing crate – a metal cage used to confine a single sow during farrowing (birth) and lactation; the crate is designed to limit the crushing of piglets when the sow lies down and does not allow the sow to turn around or engage properly with her piglets

Feedlot – an intensive animal feeding operation used to fatten livestock prior to slaughter. Animals such as pigs, sheep or cattle are confined in small areas and supplied with a high protein feed

Finfish – so-called 'true fish', this term is used to distinguish fish with gills, fins and a backbone from other aquatic animals such as shellfish and jellyfish

The **Five Freedoms** outline an acceptable state (outcomes) for welfare on-farm, in transit and at slaughter, and includes elements of health, emotional state, and physical and behavioural functioning. The following provisions, added later, specify practical measures required to secure the freedoms, and to provide a logical framework for assessing the strengths and weaknesses of husbandry systems to minimise negative welfare states:

- 1. Freedom from Hunger and Thirst** – by ready access to fresh water and a diet to maintain full health and vigour
- 2. Freedom from Discomfort** – by providing an appropriate environment including shelter and a comfortable resting area
- 3. Freedom from Pain, Injury or Disease** – by prevention or rapid diagnosis and treatment
- 4. Freedom to Express Normal Behaviour** – by providing sufficient space, proper facilities and company of the animal's own kind
- 5. Freedom from Fear and Distress** – by ensuring conditions and treatment which avoid mental suffering

Fluoroquinolones – antibiotics (an antimicrobial) typically used to treat bone, joint and skin infections caused by microorganisms

Food companies – food businesses including producers, processors, manufacturers, food retail and service companies (e.g. restaurants, bars, catering)

Free-farrowing – these systems house pregnant sows, and those with new litters, in larger pens than the sow stall, enabling the sow to move more freely, build and nest, and exhibit other natural behaviours

Free range – free range livestock have access to an outdoor area for at least part of the day, allowing greater freedom of movement

Gait score – a method for assessing lameness in poultry, cattle, pigs, using indicators such as balance, stride length, and the position of the feet

Genetic modification (or genetic engineering or manipulation) – the direct manipulation of an organism's genes using biotechnology

Gestation crate – see sow stall

Gilts – young female pigs that have yet to be pregnant or have their first litter

Growth promoting substances – used to increase the production of animals farmed for food. Examples include the hormone BST used to increase milk production, feed additives to increase meat production (ractopamine) and low dose antibiotics. Antibiotic and hormonal growth promoters are not permitted by EU legislation

In-ovo gender identification (sexing) – a method for identifying the sex of laying hens in the egg, before they hatch, via analysis of the allantoic fluid, aimed at avoiding the routine culling of day-old male chicks

Lairage – holding pens for livestock in slaughterhouses, in which they are placed following transport

Long distance live transportation – any transport of a live animal that exceeds 8 hours, from loading to unloading; welfare has been shown to decrease significantly in journeys lasting more than 8 hours

Mulesing – removal of skin from the hind-quarters of sheep breeds with excess folds of skin on their rumps, to manage fly strike. Generally done without anaesthetic or post-procedural pain relief

Mutilation – A procedure that interferes with the bone structure or sensitive tissues of an animal, usually done to manage undesirable behaviour such as tail biting (pigs) and injurious pecking (laying hens). Generally done without anaesthetic or post-procedural pain relief

Ractopamine – a feed additive used to promote growth promotion and leanness in animals raised for their meat. Ractopamine use has been banned in many countries, including European Union countries, mainland China and Russia

Phytotherapy – the study of the use of extracts of natural (plant) origin as medicines or health-promoting agents

Polled breeds – typically refers to breeds or strains of ruminants that are naturally polled (without horns) through selective breeding (as opposed to being disbudded or dehorned)

Pithing – a technique used to immobilise or kill an animal by inserting a needle or metal rod into its brain. Current USA and European Union regulations prohibit importation of beef from cows pithed due to risk of bovine spongiform encephalopathy (BSE, or “mad cow”) disease

Prophylactic antibiotic use – giving an antibiotic treatment to an animal or group of animals in anticipation of a disease or when there is a risk of infection, rather than treatment when clinical disease has been identified (therapeutic use) or giving treatment when some animals in a group or on a farm are showing signs of illness (metaphylactic use)

Routine Mutilations – the use of mutilations (see mutilation) on a routine basis, e.g. at a certain stage of production, rather than first addressing the underlying issues within the system and only using mutilations as a risk-based last resort

Sow stall (or: gestation crate) – a narrow metal crate used to confine individual sows for their 16-week pregnancy, without sufficient room for sows to turn around. Sows are generally confined in stalls during insemination and during pregnancy

Stockmanship – the knowledgeable and skillful handling of and caring for livestock in a safe, efficient, effective, professional and low-stress manner

Tail docking – removal of part of the tail (usually up to two-thirds) using a hot docking iron, sharp blade (pigs) or tight rubber ring (lambs, cattle); routine tail docking of pigs is not permitted by EU legislation. Generally done without anaesthetic or post-procedural pain relief

Teeth reduction – reduction of a piglet's 8 sharp needle teeth, shortly after birth, using sharp clippers or pliers (cutting) or shortening with a grinding device; to manage damage to the sow's teats and to other piglets. Routine teeth clipping is not permitted by EU legislation. Generally done without anaesthetic or post-procedural pain relief

Tethering – tying of an animal indoors (usually done to cattle and goats, but also to sows) to a fixed point; tethering prevents an animal from carrying out its normal behaviour, not permitted in the EU for calves (certain exceptions) and pigs

Toe clipping – the removal of the ends of toes, including the whole toenail, in poultry to prevent scratching damage. Generally done without anaesthetic or post-procedural pain relief

Triploidy – triploid fish have one extra set of chromosomes than the natural diploid state, rendering them sterile. Aquaculture using artificially induced triploidy avoids problems such as early sexual maturation and interbreeding between wild and cultured fish. However, triploids may be more susceptible to eye cataracts, temperature stress, deformities, and lower survival rates

Veal crate – a small pen or box to confine a single dairy calf; calves are often tethered in these systems and do not have adequate space to turn around or have adequate social contact. The use of veal crates is prohibited in the EU and some US states

Welfare outcome measures – performance measures directly linked to the physical, emotional and/or behavioural wellbeing of animals

References

- ¹ Nicky Amos and Rory Sullivan (2018), The Business Benchmark on Farm Animal Welfare Report 2018 (BBFAW, London). <https://bbfaw.com/publications/>
- ² The preparation of a methodology report is an integral part of our transparency and accountability processes for the annual Benchmarks. Previous Benchmark and associated methodology reports can be found on the BBFAW website at <https://bbfaw.com/publications/>
- ³ These issues and other aspects of the business case for action are discussed in the briefing and other papers on the BBFAW website, <https://bbfaw.com/publications/>
- ⁴ These reports are all available from the BBFAW website, www.bbfaw.com
- ⁵ See <https://bbfaw.com/publications/>
- ⁶ <https://bbfaw.com/investors/investor-collaboration/>
- ⁷ <https://www.bbfaw.com/investors/investor-statement/>
- ⁸ Rory Sullivan, Nicky Amos and Elisa Tjärnström (2018), How Companies and Investors are Using the Business Benchmark on Farm Animal Welfare. October 2018 (BBFAW, London). https://www.bbfaw.com/media/1538/bbfaw-briefing_company-and-investor-survey-2018-final.pdf
- ⁹ <https://www.bbfaw.com/media/1535/2018-business-benchmark-on-farm-animal-welfare-consultation-paper-final.pdf>
- ¹⁰ Nicky Amos and Rory Sullivan, R. (2018), The Business of Farm Animal Welfare (Routledge, Abingdon); Rory Sullivan (2011), Valuing Corporate Responsibility: How Do Investors Really Use Corporate Responsibility Information? (Greenleaf Publishing, Sheffield).
- ¹¹ For further information, see Nicky Amos and Rory Sullivan (2014), Reporting on Performance Measures for Farm Animal Welfare Investor Briefing No. 14 (Business Benchmark on Farm Animal Welfare, London). http://www.bbfaw.com/media/1074/investor-briefing-14_briefing-on-performance-measures.pdf
- ¹² One of the reasons for such a broad approach to information gathering was that, for many companies, reporting on farm animal welfare is not consolidated in a single location. While there have been improvements, many continue to report on farm animal welfare in an unstructured manner - with disparate references to policies and programmes across their websites or obscured within FAQs and press releases, and with inadequate signposting to relevant sources of information.
- ¹³ Note this includes Zhongpin Inc, a Chinese meat and food processing and distribution company based in China but listed on NASDAQ.
- ¹⁴ 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
- ¹⁵ For example, the use of hormone and antibiotic growth promoters is not permitted by EU legislation. While products treated with hormone growth promoters cannot be imported into the EU, the same is not true of products produced with antibiotic growth promoters.
- ¹⁶ See, further, Vicky Bond and Jemima Jewell (2014), The Impacts of Antibiotic Use in Animals on Human Health and Animal Welfare. BBFAW Investor Briefing No. 17 (BBFAW, London). <http://www.bbfaw.com/media/1070/briefing-17-impacts-of-antibiotic-use-in-animals-on-human-health-and-animal-welfare.pdf>

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