

Embargoed until 00:01 BST, Thu 27 March 2025

FOOD INDUSTRY BENCHMARK REVEALS ANIMAL WELFARE LEADERS AMONG 150 GLOBAL FOOD COMPANIES

- [BBFAW](#) ranks global food giants on their animal welfare policies, practices and performance. **Greggs PLC** joins **Marks & Spencer**, **Premier Foods** and **Waitrose** among top performers (ranking in Tier 2 of six tiers), while 14 companies improve their tier ranking.
- Three companies (**Fonterra**, **Marks & Spencer**, **Premier Foods**) break into high 'B' grades for first time on BBFAW's Impact Rating - which assesses whether the company is delivering meaningful welfare improvements for animals in their operations and supply chains.
- A majority of food companies (118 of 150 companies) however, are stuck in BBFAW's bottom two tiers, so provide limited evidence that they are managing animal welfare effectively. **Nestlé**, **McDonalds**, **Cargill**, **Tyson Foods** and **Yum! Brands** - the owners of **KFC**, are among those in the bottom two tiers for second consecutive year of the revised benchmark.
- **Atlantic Gap**: US companies score poorly across all parts of the benchmark with 42 of 43 US-based companies (98%) in the bottom two tiers, and an average score of **12%**. UK-based firms are best performers with an average score of 41%.

(London, 27 March 2025). The latest [Business Benchmark on Farm Animal Welfare \(BBFAW\)](#), released today, reveals steady progress on farm animal welfare across the global food industry.

A leading group of companies demonstrate that humane standards of farm animal welfare, such as providing animals with more space or using best practice methods of slaughter, is integral to their business strategy. There are concerns however that a significant block of large food companies (79%), including household names like Nestlé and McDonalds remain in 'Tiers 5 and 6' - the bottom two tiers - for a second consecutive year.

BBFAW is the world's leading annual assessment of the food industry's farm animal welfare policies, practices and performance, assessing 150 global food companies across 51 criteria and 5 pillars, and ranking across six tiers (see [full results table in notes to editor](#)). The programme is supported by partners **Compassion in World Farming** and **FOUR PAWS** and this year's results are the second since BBFAW introduced more stringent criteria that put a greater focus on companies' welfare performance and approach to reducing their reliance on animal sourced food.

There was marginal positive progress this year. Average overall scores across all companies rose one percentage point for the second consecutive year, and 14 companies moved up a tier ranking. These include **Greggs plc**, who join **Marks & Spencer**, **Premier Foods** and **Waitrose** as the only companies reaching 'Tier 2' of the benchmark - meaning the companies have made farm animal welfare an integral part of their business strategy and achieved a score of between 62-80% against all BBFAW criteria.

Progress for a majority of food companies is slow however. 118 companies (79%), including **Nestlé**, **McDonalds** and **Cargill**, are in the bottom two tiers (Tiers 5 and 6) – meaning they provide limited or no evidence that they have policies or processes in place to manage farm animal welfare effectively. These include 22 companies (15%), who have still not published a formal overarching animal welfare policy including Avolta AG (previously Autogrill).

Impact Ratings

BBFAW's 'Impact Rating' grades companies (from 'A' to 'F') on their tangible welfare impacts. Grades are based on the Performance Impact questions which, for example, measure the percentage of cage-free laying hens in a company's supply chain, the proportion of dairy cattle free from disbudding and dehorning, and the proportion of pigs free from tail docking.

At the top of the 2024 Impact Ratings three companies (**Marks & Spencer, Premier Foods** and **Fonterra**) qualify for a high 'B' grade for the first time. In total 14 companies (9%) increased their Impact Rating in 2024. Most notably **Fonterra**, with their singular focus on dairy, have placed a significant emphasis on global reporting and impact, resulting in a rise in their Impact Rating by three grades (from 'E' to 'B').

However, a large majority of benchmarked companies (91%) score the lowest 'Impact Rating' grades – 'E' or 'F'. This means they have yet to show they are delivering improved welfare impacts for farm animals in their supply chains.

Nicky Amos, Executive Director of the BBFAW said:

"This is the second year of results since BBFAW introduced more stringent criteria and it's encouraging to see companies responding positively with 14 companies moving up a tier, and a further 14 improving their Impact Rating. It's not just animals that feel the benefit of those changes – with more space to roam and fewer farm animals suffering mutilations or long-distance live transportation. Companies feel the benefits too - in terms of building their reputation with consumers and getting ahead of potential regulation.

"While the leaders are picking up the pace, clearly much more needs to be done with the large majority of food companies, including many household names, stuck in BBFAW's bottom two tiers. Too many food companies still provide limited evidence that they are managing animal welfare effectively.

"Perhaps most striking this year is the Atlantic Gap. While the UK is the highest-performing region, practically all North American food companies are stuck in the bottom two tiers of the benchmark."

Geographic diversity

This year's BBFAW results show stark contrast in performance between different geographies.

UK-based companies dominate the upper tier rankings, and have an average overall score of **41%**. Companies based in Europe and Latin America perform next best with average overall scores of **20%**. Average scores for North America were **12%**, and in the Asia Pacific region just **9%**.

Given the role of animal welfare in potential UK/US trade discussions the contrast on either side of the Atlantic is perhaps most striking. The UK boasts all four top ranking companies and two of the three companies registering the highest 'B' grade for Impact Rating. By contrast **98%** (42/43) of US-based companies appear in the bottom two tiers (Tiers 5 and 6) and all N. American companies receive the worst Impact Rating grades ('E' or 'F').

In Asia Pacific, 19 of 21 companies (90%) appear in Tiers 5 and 6. Many of these are domiciled in China, reflecting the relative immaturity of animal welfare in this region. However, it is notable that one of only three companies to score a 'B' Impact Rating grade (Fonterra) is domiciled in this region - based specifically in New Zealand.

Other findings in this year's BBFAW include:

- **Widening gap:** Fourteen companies (9%) moved up a tier ranking with nine of these increasing their overall average score by five per cent or more. In addition, while the overall average score of the top 20% of companies improved 4% this year, to **43%**, the overall average score of the bottom 20% remained unchanged, at **3%**.
- **Sentience:** 67 companies (45%) recognise farm animals as sentient beings in 2024, an increase from 54 companies (36%) in 2023.
- **Antibiotics:** Only 42% of companies have commitments in place to end prophylactic and routine metaphylactic antibiotic use – despite the risk of surging antibiotic resistance.
- **Reducing reliance on animal-sourced foods:** The results of a set of questions assessing whether companies are reducing their reliance on meat, fish, dairy and eggs show that 29% of the benchmark (43 companies) now acknowledge the need to reduce reliance on animal-sourced foods as a business issue. This is a rise from 25% in 2023. Two companies - Waitrose and Hilton Food Group - scored 85% for this set of questions compared to an average score of just 11%.
- **Sub-sectors:** The best performing sub-sector in the benchmark is *'Producers and Manufacturers'* - with an overall average score of 21%; with *'Retailers and Wholesalers'* achieving the second highest average score (17%). It's notable that UK retailers and wholesalers scored the highest average score on Governance and Management achieving 81% for this pillar. *'Restaurants and Bars'* have the lowest overall average score at 16%, however the score for *'Restaurants and Bars'* is up from 14% in 2023 and in a further sign of improvement five of the 14 Restaurant and Bar companies moved up a Tier Ranking in 2024 – including Greggs PLC which broke into Tier 2 this year.
- **Long-term improvements:** 128 companies (85%) have formal policies on farm animal welfare compared to 46% of the 68 companies evaluated when BBFAW started in 2012.
- **Species diversity:** Animal welfare ambitions differ among species:
 - **Pigs:** Only **11%** of companies (15 of 137) with pigs in their supply chains have published clear time-bound targets to end the use of gestation crates/sow stalls (up from 9% in 2023).
 - **Dairy cows:** **22%** of companies (31 of 142) with dairy cows in their supply chains published time-bound targets to eliminate, or already eliminated, the use of tethering (up from 18% in 2023).
 - **Laying hens:** **70%** of companies (99 of 149) with eggs in their supply chains publish a time-bound target to achieve, or have already achieved, 100% of eggs from cage-free sources (down from 73% in 2023).
 - **Broiler chickens:** **30%** of companies (40 of 134) with broiler chickens in their supply chain have set a time-bound target to achieve the requirements for the Better or European Chicken Commitment (down from 31% in 2023).

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

"Businesses play a critical leadership role in transforming food systems for a more sustainable and animal welfare-friendly future. A key first step is eliminating cages—and we are already making progress. As the impact of current practices weighs on people, animals, and the planet, the urgency for change will only grow. Every company has the power to drive meaningful progress by shifting toward higher-welfare, cage-free products, diversifying protein portfolios with more plant-based options, and embracing regenerative farming. Together, we can build a food system that respects animals, supports the planet, and creates a better future for all."

Josef Pfabigan, Chairman of the Board and CEO, Four Paws, said:

“FOUR PAWS once more supports BBFAW’s efforts to encourage higher animal welfare in the food industry and a transition towards sustainable and cruelty-free food systems globally. It is encouraging to see a group of leading companies piloting modern strategies and implementations against the systematic abuse of over 80 billion farmed animals that are slaughtered for food every year. I am pleased to see more companies starting to address the need to reduce dependence on food of animal origin which not only supports a critical reduction in greenhouse gas emissions but also offers the chance to improve the welfare standards of farmed animals. However, for the majority of companies, animal welfare is merely lip service to this day. Here, tangible measures and concrete actions must urgently be implemented. FOUR PAWS keeps on advocating and fighting for ending cruel practices in factory farming, including a reduction of farmed animals, worldwide.”

BBFAW is supported by a coalition of institutional investors, managing over \$2.4 trillion in assets, who will engage with the companies in the year ahead to drive improvement.

Robert-Alexandre Poujade, ESG analyst, biodiversity lead at BNP Paribas Asset Management - a founding signatory to the BBFAW Investor Collaboration and Global Investor Statement - said:

“The Business Benchmark on Farm Animal Welfare is a unique yardstick for the market that gives investors a valuable insight into the management quality of individual food companies. It helps to shine a light on which companies are best managing not just on-the-ground animal welfare systems, but business-critical issues such as reputational risk, resilient supply chains and antimicrobial resistance. This year the results tell us a lot about which companies are taking this issue seriously.”

Jonathan Bey, Senior Analyst, Responsible Investing, NEI Investments, said

“For investors, the Business Benchmark on Farm Animal Welfare provides an important framework for assessing and mitigating risks associated with farm animal welfare. The BBFAW incentivizes continuous improvement by benchmarking company performance. Commitment to animal welfare, demonstrated through tangible performance impact, is increasingly essential for building resilient businesses that are well-positioned to meet evolving consumer preferences and navigate changing regulatory landscapes.”

The full report is available [here](#)

Notes to editor

- For further information, or for interviews with BBFAW spokespeople, or companies assessed, please contact:
 - **Sasha Hill, Chronos Sustainability (BBFAW Secretariat)**
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- The Business Benchmark on Farm Animal Welfare (BBFAW) was formed in 2012 and is the globally recognised investor framework for assessing the quality of companies’ practices, processes and performance on farm animal welfare. Companies were assessed on their approach to managing farm animal welfare in five areas: (1) Policy Commitments, (2) Governance and Management, (3) Targets (4) Performance Impact; and (5) Reducing Reliance on animal sourced foods. Company assessments were based on information published by companies on the date of their assessments. All companies were assessed during the period from October to November 2024.
- The 31 participants in the BBFAW investor collaboration are: Aberdeen Standard Investments, AMP Capital Ethical Leaders Fund, Australian Ethical Investment, Aviva Investors, Bâtirente, BNP Paribas Asset Management, Boston Trust Walden, Brunel Pension Partnership, Candriam, Cardano, Castlefield, Investment Partners LLP, CCLA, Central Finance Board of the Methodist Church, Collier Capital, EdenTree Investment Management, Epworth Investment Management, Greenbank, Karner Blue Capital, KBI Global Investors, Länsförsäkringar Fondförvaltning AB, NEI Investments, NN Group, OpenInvest, Robeco, RRSE, Simplicity, Sonen Capital, The Sustainability Group of Loring, Wolcott & Coolidge Trust, LLC, Trillium Asset Management, Triodos Investment Management, Vaudoise Assurances Holding SA.
- A full list of the 150 companies assessed and their ranking is below:

Company Tier Rankings and Impact Ratings* IR

Tier 1 Leadership	Tier 2 Integral to business strategy	Tier 3 Established but work to be done	Tier 4 Making progress on implementation	Tier 5 On the business agenda but limited evidence of implementation	Tier 6 No evidence on the business agenda
0	4	8	20	60	58
	Greggs PLC ↑ C Marks & Spencer PLC ↑ B Premier Foods PLC ↑ B Waitrose C	Co-op UK D Cranswick PLC ↓ D Danish Crown AmbA. ↑ B Fonterra ↑ B Groupe Danone SA C Migros-Genossenschafts-Bund C Minerva Foods ↑ D Noble Foods D	ALDI Süd/ALDI Einkauf SE & Co. oHG F Arla Foods Ltd. ↑ E Barilla SpA E BRF SA E Compass Group PLC F Groupe Lactalis E Hershey Co. ↑ E Hilton Food Group ↑ E J Sainsbury PLC D JD Wetherspoon PLC. ↑ F LDC Groupe F Les Mousquetaires E Marfrig Global Foods SA ↑ D Mitchells & Butlers PLC. ↑ F Terrena Group. ↑ E Tesco PLC ↓ E Unilever NV ↓ F Whitbread PLC. ↑ E Wm Morrison Supermarkets PLC. ↑ E Woolworths Limited ↓ F	(The) Kroger Company F 2 Sisters Food Group (Boparan Holdings Ltd) F Agro Super F Ahold Delhaize F ALDI Einkauf SE & Co. oHG (ALDI Nord) F Aramark Corporation F Bellis Topco Ltd./Asda F Bimbo F Campbell Soup Company ↑ F Cargill F Carrefour SA. ↓ F Casino Guichard-Perrachon SA F Charoen Pokphand Foods F Chipotle Mexican Grill F Coles Group F Colruyt F ConAgra F Coop Group (Switzerland)/Coop Genossenschaft E Cooperativa Central Aurora Alimentos F Coopérative U Enseigne ↓ F Cooperl Arc Atlantique F Cremonini SpA F Darden Restaurants PLC. ↑ F E.Leclerc F EDEKA Group F Elio Group F Elio Group F Ferrero Group F General Mills Inc F Gruppo Veronesi F Harmel Foods Corporation F ICA Gruppen AB F IKEA (Inter IKEA Group) F JBS SA F Jeronimo Martins F Kraft Heinz Company F Maple Leaf Foods ↑ E McDonald's Corporation F METRO AG F Metro Inc F Mowi ASA F Nestlé SA F OSI Group F Papa John's Pizza F Perdue Farms F Plukon Food Group F Restaurant Brands International F REWE Group F Royal FrieslandCampina. ↓ F Saputo Inc F Schwarz Gruppe F Sodexo F SSP Group F Sysco Corporation F The Cheesecake Factory F Tönnies Group F Tyson Foods Inc F Vion Food Group F Wayne-Sanderson Farms. ↑ F Yum! Brands Inc F	Aeon Group F Albertsons F Alimentation Couche-Tard F Amazon/Whole Foods Market F Avolta AG (previously Autogrill) F Beijing Dabeinong Technology Group Co., Ltd. F BJ's Wholesale Club Holdings F Bloomin' Brands Inc F C&S Wholesale F Camst – La Ristorazione Italiana Soc. Coop. ARL F Cencosud F Chick-fil-A F China Resources Vanguard F China Yurun Group Limited F CKE Restaurants F Conad Consorzio Nazionale F Cooke Seafood Inc F Coop Italia. ↓ F Costco Wholesale Corporation F Cracker Barrel F Dairy Farmers of America F Dico's/Ting Hsin International Group F Dino Polska SA F Domino's Pizza Inc F Empire Company/Sobey's F Gategroup Holding AG F H E Butt Company F Habib's F Industrias Bachoco F JAB Holding Company F Kerry Group. ↓ F Lianhua Supermarket Holdings Co F Loblaw Companies Limited F Mars Inc F Maruha Nichiro F Meiji Holdings F Mercadona SA F Mondelēz International F Müller UTM F New Hope Liuhe Co Ltd F Nippon Ham F Publix Super Markets Inc F Roark Capital (Inspire Brands, Subway et al.) F Seaboard Corp F Seven & i Holdings F Spar Holding AG F Starbucks Corporation F Target Corporation F UNFI F US Foods F Walmart Inc F Wendy's Company (The) F Wens Foodstuff Group F WH Group Ltd F Yili Group F Yonghui Superstores Co Ltd F Yum China Holdings F Zhongpin Inc (Huayu Holdings) F

* Impact ratings are based on companies' scores for the 20 performance impact questions, namely Q30 to Q49. The scores are presented in a six-tier rating, labelled A-F. The arrows indicate the change in Tier Ranking and Impact Rating compared to 2023.

BBFAW

Business Benchmark on
Farm Animal Welfare



The Business Benchmark on Farm Animal Welfare (BBFAW): BBFAW is the leading global measure of farm animal welfare management, policy commitment, performance and disclosure in food companies. It enables investors, companies, NGOs and other stakeholders to understand corporate practice and performance on farm animal welfare, and it drives – directly and through the efforts of others – corporate improvements in the welfare of animals reared for food. The BBFAW Secretariat maintains the Global Investor Statement on Farm Animal Welfare and convenes the Global Investor Collaboration on Farm Animal Welfare, a collaborative engagement between major institutional investors and food companies on the issue of farm animal welfare. The programme is supported by Compassion in World Farming and FOUR PAWS, who provide technical expertise, guidance, funding and practical resources, alongside supporting the assessed food businesses with training, programmatic expertise and consultancy engagement. More information on the programme can be found at www.bbfaw.com

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

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

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