The Business Benchmark on Farm Animal Welfare Report 2021

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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.

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. In addition, the BBFAW Secretariat 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 partner, Compassion in World Farming and supporting partner, 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 farm animal welfare charity advancing the wellbeing of farm animals and their integration into a more humane sustainable food system, 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, and to rebalance their animal footprint in a food system fit for the future. The team offers strategic advice and expert technical support for the development, implementation and communication of higher welfare policies and practices, and, increasingly, solutions and frameworks for a more humane sustainable food system.

Compassion engages directly with many of the companies evaluated 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, EggTrack, and its advisory services to help companies understand how they are performing relative to their peers, to identify areas and mechanisms for continuous improvement, and to highlight sources of risk and advantage.

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

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, the organisation advocates for a world where humans treat animals with respect, empathy and understanding. FOUR PAWS' sustainable campaigns and projects 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, 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.

More information on FOUR PAWS can be found at: **www.four-paws.org**

Contents

Foreword

BBFAW: The First 10 Years

Over the past decade, the BBFAW has become the leading global measure of farm animal welfare. It has developed into a global programme that has enabled investors, companies, and other stakeholders to understand how well companies are managing farm animal welfare and, crucially, to drive improved corporate practice and performance on the issue.

The Benchmark was launched in 2012 with the mission of driving higher farm animal welfare standards across the global food industry at a time when it was a very new business issue. Companies were unclear about how they were expected to manage and report on farm animal welfare, and investors had no real way of credibly assessing how well companies were managing risks and opportunities in this area.

The BBFAW was designed as a tool that enabled investors to understand how companies were managing farm animal welfare within their operations and supply chains. It followed the logic applied by investors when evaluating companies on other environmental, social and governance (ESG) issues. This involved assessing companies on their management and policy commitments, their governance systems and processes, and their disclosures on farm animal welfare. BBFAW subsequently increased its focus on performance reporting and impact, enabling investors to assess company practices and processes in farm animal welfare. The introduction of the BBFAW Impact Rating in 2020, and detailed in full in this report, represents a further strengthening of this focus on impact. Structuring BBFAW in this way also meant that the Benchmark provided a clear and explicit framework for companies to develop their own management approaches on farm animal welfare.

BBFAW is not just an assessment framework or an annual report; it is a comprehensive programme of dialogue and engagement with companies and with investors. Alongside the annual Benchmark, the BBFAW has engaged many of the world's leading investors in the mission of encouraging food companies to take action on farm animal welfare. In 2015, the BBFAW established the first ever Global Investor Statement on the topic and convened the world's first Global Investor Collaboration on Farm Animal Welfare. These programmes are each supported by over 30 institutional investors with over £2.25 trillion in assets under management.

These efforts – the annual Benchmark and the company and investor engagement – have helped to deliver real improvements in the way that companies manage and report on farm animal welfare. The 2021 Benchmark reveals that of the 150 companies evaluated, 134 (89%) now acknowledge farm animal welfare as a business issue (compared to 71% of the 68 companies evaluated in 2012), 122 companies (81%) have formal policies on farm animal welfare (46% in 2012), and 119 companies (79%) have published formal objectives and targets for animal welfare (26% in 2012).

The Future

Having helped establish farm animal welfare on the investment and business agenda, the focus now is on ensuring that companies really do deliver substantial and measurable impact on farm animal welfare.

Our organisations – Compassion in World Farming and FOUR PAWS – agree that much more needs to be done to drive up welfare standards for the 80 billion animals farmed for food every year, and to move away from factory farming – the biggest cause of animal cruelty on the planet and a key driver of climate change and the collapse of nature.

We want to end factory farming and change the food system in a sustainable way through three important strategic interventions. First, we want to see a significant reduction in the number of animals farmed for food – aiming for at least a 50% reduction by 2040 globally. Second, we want to make sure that animals who are still farmed for food experience positive welfare states. Third, we strive to replace animal-based products with plant-based alternatives.

We will, therefore, be looking to make substantial changes to the structure and content of the BBFAW Benchmark. We will strengthen the Benchmark's emphasis on delivering welfare improvements – through the new BBFAW Impact Rating as well as through adjustments to the weighting of the performance impact scoring. We will also be looking to significantly adapt the criteria to focus on the elimination of the most cruel practices as well as evaluating companies on their meat and dairy reduction commitments and performance.

We anticipate that the process of redesigning and relaunching the Benchmark will take between 9 and 12 months. During this period, it is our intention to collaborate with companies and investors to ensure that the BBFAW continues to play an important role as an accountability instrument.

The BBFAW is integral to the strategy of our organisations. It will signal to companies what is expected of them. It will allow investors and other stakeholders to hold companies to account for their performance on farm animal welfare. It will enable us to work with companies and investors to realise our mission for a world where factory farming has ended and all animals are treated with compassion and respect.

Philip Lymbery
Global CEO,
Compassion in World Farming

Gerald Dick
Executive Board Member,
FOUR PAWS

About 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.

Why benchmark food companies?

Farm animal welfare is an important issue for companies across the food sector, including retailers, food 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, investor interest, peer pressure, and the brand and market opportunities for companies that adopt higher farm animal welfare standards.[1]

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, performance and reporting on farm animal welfare issues.

Alongside a programme of investor and company engagement, 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, ten Benchmarks have been completed, of which the 2021 Benchmark is the most recent.

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.

Governance

The programme is supported by BBFAW's founding partner, Compassion in World Farming and its supporting partner FOUR PAWS, who together provide technical expertise, guidance, funding and practical resources.

The BBFAW Steering Committee, comprising senior members from each of the 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 driven by a Technical Working Group (TWG) comprising the BBFAW Secretariat and representatives of each of the partners. The members of the TWG for the 2021 benchmarking process were:

- Nicky Amos, Executive Director, BBFAW Secretariat.
- Dr Heleen van de Weerd, Animal Welfare Expert, BBFAW Secretariat.
- Basia Romanowicz, Senior Programme Manager, BBFAW Secretariat.
- Dr Nathan Rhys Williams MRCVS, Senior Programme Manager, BBFAW Secretariat.
- Dr Tracey Jones, Director of Food Business, Compassion in World Farming.
- Louise Valducci, Head of Food Business (EU Programme), Compassion in World Farming.
- Elisa Bianco, Senior Food Business Manager, Compassion in World Farming.
- Dr Martina Stephany, Director Farm Animals and Nutrition, FOUR PAWS.
- Dr Marlene Kirchner, Lead Expert Farm Animals and Nutrition, FOUR PAWS.

The 2021 Benchmark Highlights

1. The 2021 Benchmark Highlights

This is the tenth annual edition of the Business Benchmark on Farm Animal Welfare. It analyses the farm animal welfare policies, management systems, reporting and performance of 150 of the world's largest food companies, across 37 distinct, objective criteria. As such, it is the most authoritative and comprehensive global account of corporate practice on farm animal welfare.

In addition to the key findings and analysis presented within this report, the data are presented on an interactive online dashboard on the BBFAW website. You can access the dashboard here: **https://bbfaw.com/benchmark/**

Overall Findings

1: A decade of implementation of the BBFAW has significantly advanced corporate management practice and reporting on farm animal welfare
Ten years after the publication of the inaugural Business Benchmark on Farm Animal Welfare, we have seen significant improvement in the way that companies are incorporating farm animal welfare into their management and disclosure practices. The 2021 Benchmark reveals that of the 150 companies evaluated, 134 (89%) now acknowledge farm animal welfare as a business issue (compared to 71% of the 68 companies evaluated in 2012), 122 companies (81%) have formal policies on farm animal welfare (compared to 46% of companies in 2012), and 119 companies (79%) have published formal objectives and targets for animal welfare (compared to 26% of companies in 2012). The significant improvement made in companies' governance of farm animal welfare is clear to see. Despite this, almost one in five food companies (28 of the 150 companies) have not published a formal farm animal welfare policy.

2: Despite the progress we are seeing, companies are too slow in delivering meaningful welfare impacts
Consistent with our findings in recent iterations of the BBFAW, performance impact is not at the level we would expect it to be, given the level of corporate and investor attention to farm animal welfare over the past decade. In 2021, the overall average score for the 10 Performance Impact questions is just 12% compared to 8% in 2020.

The lack of emphasis on performance is further highlighted in the 2021 Benchmark. For example, whilst 100 companies (67%) report some data on the proportion of animals (across laying hens, broiler chickens, pigs and dairy cattle) in their global supply that is free from close confinement, much of this data is only partially reported and is limited by geography or product type (e.g. fresh meat). The most widely reported performance impact data relates to laying hens where 88 companies (59%) report some data, yet, even here, only 23 companies report that 60% or more of the laying hens in their global supply chains are cage-free.

What this tells us is that whilst a significant proportion of companies – 119 in total (or 79%) – have published formal improvement objectives for farm animal welfare, many of these companies are not reporting improved welfare for animals on the ground.

Companies continue to invest in animal welfare but more needs to be done to demonstrate delivery of welfare improvements for animals on the ground.

3: The BBFAW is placing continuing emphasis on performance impact in line with the programme's long-term objective to drive up farm animal welfare standards in global supply chains

Changes to the 2021 methodology placed further emphasis on companies' performance reporting and performance impact. This, combined with stricter interpretation of company disclosures, has seen the overall average score drop from 35% in 2020 to 32% in 2021, and has led to 36 companies dropping a tier. Noteworthy, given the scale of changes introduced in 2021, six companies have improved their score sufficiently to increase their ranking by one tier.

Viewed alongside the BBFAW tier ranking, the new Impact Rating, which is published in full for the first time this year, provides greater scrutiny of companies by assigning an A-F rating based on their declared welfare impacts. The baseline results reveal a stark disconnect between many companies' disclosure of management processes and the subsequent impact on farm animal welfare in their supply chains. None of the evaluated companies achieve an 'A' Impact Rating. Only five companies – Greggs PLC, Marks & Spencer PLC, Noble Foods, Premier Foods PLC and Waitrose – achieve a 'B' Impact Rating (corresponding to 62-80% of the scores available for the Performance Impact questions), indicating that these companies (all of whom are in Tiers 1 and 2) are declaring improved welfare impacts for a reasonable proportion of farm animals in their global supply chains. Only 18 companies ranked in Tiers 2, 3 and 4 achieve 'C' and 'D' Impact Ratings, indicating that they are declaring improved welfare impacts for a limited proportion of farm animals in their global supply. Notably, 127 (85%) of the 150 companies evaluated achieve an 'E' or 'F' Impact Rating, signifying that these companies are failing to demonstrate improved welfare impacts for farm animals in their global supply chains.

4: Investors have played a major role in influencing corporate practice and disclosure on farm animal welfare

The BBFAW has involved many of the world's leading investors in the mission of encouraging food companies to take action on farm animal welfare. In 2015, the BBFAW established the first ever Global Investor Statement on Farm Animal Welfare and has convened the Global Investor Collaboration on Farm Animal Welfare; the first initiative of its kind globally. These programmes are each supported by over 30 institutional investors with over £2.3 trillion in assets under management.

Over the ten iterations of the Benchmark, the BBFAW has proactively engaged with the investment community, encouraging investors to use their influence to urge companies to take appropriate action to manage the business risks and opportunities presented by farm animal welfare. This engagement is widely cited by companies as a key driver for ensuring that farm animal welfare remains on the management agenda.

The results of our ongoing engagements with investors suggest that – as a result of the annual Benchmark itself and the BBFAW's extensive dialogue and capacity-building efforts – investors are increasingly likely to engage with companies to encourage them to better manage the issue of farm animal welfare, and increasingly, to seek evidence that companies' management practices are capable of delivering impact on the ground for farm animals.

Company Tier Rankings

As in previous Benchmarks, we have grouped the assessed companies into one of six tiers, based on their overall percentage scores, as indicated in Table 1.1. A composite picture of 2021 company scores by Tier ranking and by Impact Rating (IR) appears in Figure 1.1.

Table 1.1: BBFAW Tiers

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

Company Impact Ratings

This year, companies' individual Impact Ratings are published for the first time alongside their Tier rankings. The BBFAW Impact Rating was introduced in 2020 to provide a more accurate picture of the welfare of animals in a company's supply chain. The Impact Rating tool supports the BBFAW's long-term ambition to improve the welfare of animals in the global food system.

The BBFAW Impact Rating is designed to help investors and other stakeholders to better assess whether companies are delivering welfare improvements to animals in their supply and answer critical questions about the effectiveness of their management systems and processes such as: whether a company is effectively implementing its policies in its operations and supply chain; whether it is delivering on its objectives and targets; whether it is effectively managing the risks and opportunities presented by farm animal welfare; or whether it is improving the welfare of the animals in its operations and supply chain.

The scores are presented in a six-tier rating, labelled A-F, using the percentage boundaries presented in Table 1.2. (For details on how the Impact Rating is calculated see page 26.)

Table 1.2: 2021 Impact Ratings*

Impact Rating			Number of companies 2020	Number of companies 2021
A	**>80%**	These companies are declaring improved welfare impacts for a reasonable proportion of farm animals in their operations and/or supply chains.	**0**	**0**
B	**62 – 80%**		**4**	**5**
C	**44 – 61%**	These companies are declaring improved welfare impacts for at least some farm animals in their operations and/or supply chains.	**3**	**6**
D	**27 – 43%**		**10**	**12**
E	**11 – 26%**	These companies have yet to demonstrate that they are delivering improved welfare impacts for farm animals in their operations and/or supply chains.	**12**	**25**
F	**<11%**		**121**	**102**

*Impact ratings are based on companies' scores for the 10 performance impact questions, namely Q28 to Q37.

Figure 1.1: Company Tier Rankings and Impact Rating (IR)

Tier 1 – Leadership

4

- ▬ Marks & Spencer PLC (B)
- ▬ Noble Foods (B)
- ▲ Premier Foods PLC (B)
- ▬ Waitrose (B)

Tier 2 – Integral to business strategy

12

- ▬ Greggs PLC (B)
- ▬ Cargill (C)
- ▼ Cranswick (C)
- ▬ Groupe Danone (C)
- ▬ Tesco PLC (C)
- ▬ Barilla SpA (D)
- ▬ Co-op UK (D)
- ▬ J Sainsbury PLC (D)
- ▲ Maple Leaf Foods (D)
- ▬ Marfrig Global Foods SA (D)
- ▬ Unilever NV (D)
- ▬ Wm Morrison Supermarkets PLC (D)

Tier 3 – Established but work to be done

31

- ▼ Fonterra (C)
- ▼ Nestlé SA (C)
- ▬ 2 Sisters Food Group (D)
- ▬ BRF SA (D)
- ▬ Coles Group (D)
- ▼ Danish Crown AmbA (D)
- ▬ Domino's Pizza Group (D)
- ▬ ALDI Nord (ALDI Markt) (E)
- ▬ ALDI Süd/Aldi Einkauf GmbH&Co (E)
- ▬ Carrefour SA (E)
- ▬ Charoen Pokphand Foods (E)
- ▬ Cheesecake Factory (The) (E)
- ▬ Chipotle Mexican Grill (E)
- ▬ Compass Group PLC (E)
- ▼ Coop Group (Switzerland)/Coop Genossenschaft (E)
- ▬ Elo Group (E)
- ▼ Hilton Food Group (E)
- ▬ IKEA (Inter IKEA Group) (E)
- ▬ Jeronimo Martins (E)
- ▬ Les Mousquetaires (E)
- ▬ Migros-Genossenschafts-Bund (E)
- ▼ Mitchells & Butlers PLC (E)
- ▬ Perdue Farms (E)
- ▼ Whitbread PLC (E)
- ▼ Woolworths Group (E)
- ▬ Yum! Brands Inc (E)
- ▬ JBS SA (F)
- ▬ Minerva Foods (F)
- ▬ Mowi ASA (F)
- ▲ Terrena Group (F)
- ▬ Vion Food Group (F)

Tier 4 – Making progress on implementation

35

- ▼ Casino Guichard-Perrachon SA (E)
- ● EG Group (E)
- ▬ ICA Gruppen AB (E)
- ▼ Royal FrieslandCampina (E)
- ▬ Agro Super (F)
- ▬ Ahold Delhaize (F)
- ▬ Aramark Corporation (F)
- ▼ Arla Foods Ltd (F)
- ▬ Associated British Foods PLC (F)
- ▬ Campbell Soup Company (F)
- ▬ Colruyt (F)
- ▬ Coop Italia (F)
- ▬ Coopérative U Enseigne (F)
- ▬ Cooperl Arc Atlantique (F)
- ▬ Cremonini SpA (F)
- ▲ E.Leclerc (F)
- ▬ Edeka Group (F)
- ▼ Elior Group (F)
- ▼ Hormel Foods Corporation (F)
- ▼ JD Wetherspoon (F)
- ▼ KraftHeinz (F)
- ▼ LDC Group (F)
- ▼ Lidl Stiftung & Co (F)
- ▼ McDonald's Corporation (F)
- ▬ OSI Group (F)
- ▬ Papa John's Pizza (F)
- ▬ Plukon Food Group (F)
- ▬ Restaurant Brands International (F)
- ▼ REWE Group (F)
- ▬ Saputo Inc (F)
- ▼ Schwarz Unternehmens Treuhand/Kaufland (F)
- ▼ Sodexo (F)
- ▬ Tönnies Group (F)
- ▼ Tyson Foods (F)
- ▬ WH Group (F)

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

43

- ▬ Hershey Co (E)
- ▬ Mars Inc (E)
- ▬ Albertsons (F)
- ▬ Amazon/Whole Foods Market (F)
- ▬ Bimbo (F)
- ▬ BJ's Wholesale Club Holdings (F)
- ▼ Camst – La Ristorazione Italiana Soc. Coop. ARL (F)
- ▲ Cencosud (F)
- ▬ Chick-fil-A (F)
- ▬ ConAgra (F)
- ▬ Cooke Seafood (F)
- ▼ Cooperativa Centrale Aurora Alimentos (F)
- ▼ Costco Wholesale Corporation (F)
- ▬ Cracker Barrel (F)
- ▬ Dairy Farmers of America (F)
- ▼ Darden Restaurants PLC (F)
- ▬ Empire Company/Sobey's (F)
- ▼ Ferrero SpA (F)
- ▬ General Mills Inc (F)
- ▬ Groupe Lactalis (F)
- ▼ Gruppo Veronesi (F)
- ▬ H E Butt Company (F)
- ▲ Industrias Bachoco (F)
- ▬ Inspire Brands Inc (F)
- ▬ JAB Holding Company (F)
- ▬ Kerry Group (F)
- ▼ Kroger Company (The) (F)
- ▬ Loblaw Companies Limited (F)
- ▬ Mercadona SA (F)
- ▼ Metro AG (F)
- ▬ Mondelēz International (F)
- ▬ Publix Super Markets (F)
- ▬ Sanderson Farms (F)
- ▬ Seaboard Corp (F)
- ▬ SSP Group (F)
- ▬ Starbucks Corporation (F)
- ▬ Subway/Doctor's Associates Inc (F)
- ▼ Sysco Corporation (F)
- ▬ Target Corporation (F)
- ▬ UNFI (F)
- ▬ US Foods (F)
- ▼ Walmart Inc (F)
- ▼ Wendy's Company (The) (F)

Tier 6 – No evidence on the business agenda

25

- ▬ Aeon Group (F)
- ▬ Alimentation Couche-Tard (F)
- ▬ Autogrill SpA (F)
- ▬ Bloomin' Brands (F)
- ▬ C&S Wholesale (F)
- ▬ China Resources Vanguard (F)
- ▬ China Yurun Group Limited (F)
- ▬ Chuying Agro-Pastoral Group (F)
- ▬ CKE Restaurants (F)
- ▬ CNHLS (F)
- ▬ Conad Consorzio Nazionale (F)
- ▬ Dico's/Ting Hsin International Group (F)
- ▬ Gategroup Holding (F)
- ▬ Habib's (F)
- ▬ Lianhua Supermarket Holdings Co (F)
- ▬ Maruha Nichiro (F)
- ▼ Meiji Holdings (F)
- ▬ Müller Group (F)
- ▬ New Hope Liuhe Co (F)
- ▬ Nippon Ham (F)
- ▬ Seven & I Holdings (F)
- ▼ Umoe Gruppen (F)
- ▬ Wens Foodstuff Group (F)
- ▬ Yonghui Superstores Co (F)
- ▬ Zhongpin (F)

Key

- ■ 2021
- ▲ Up at least 1 tier
- ▼ Down at least 1 tier
- ▬ Non-mover
- ● New company
- (x) Impact Rating (IR)

In the 2021 Benchmark, the overall average score was 32% (compared to 35% in 2020). While the overall effect of the methodology changes (see Box 1.1) has been to significantly lower the average score achieved by companies, important progress has nevertheless been made by some companies who are continuing to invest in improving welfare standards. Had we not changed the Benchmark methodology in 2021, the overall average score would have increased from 35% to 36% between 2020 and 2021, consistent with previous annual progress.

A more accurate picture of company performance emerges when the Impact Ratings are presented alongside companies' Tier rankings (Figure 1.1). Here, we see that whilst all companies in Tier 1 achieve an Impact Rating B, there are significant variations in the Impact Ratings of companies in other Tiers. For instance, in Tier 3, 19 companies achieve an Impact Rating E and five companies achieve an Impact Rating F. Similarly, all 35 companies in Tier 4 achieve a low Impact rating of E or F, indicating that these companies have yet to demonstrate that they are delivering improved welfare impacts for farm animals in their operations or supply chains.

The Impact Rating will be an increasingly important indicator of company performance on farm animal welfare as investors, business-to-business customers, NGOs and other stakeholders seek assurance that companies' management policies and practices are capable of delivering impact on the ground for farm animals.

Box 1.1

Changes to the 2021 Benchmark Methodology

The overall weighting of the Performance Reporting and Impact section increased from 35% to 45% of the total score available, and the scoring approach for the 10 Impact questions (Q28-37) was modified to provide additional points for companies who reported partial but substantial performance data (such examples are outlined on page 26.)

Additionally, the focus of two questions (Q14 and Q27) was changed to remove the potential for double scoring. Specifically, Q14 was focused on explanations of progress against objectives and targets, and Q27 was focused on explanations of progress in performance related to welfare outcome measures, rather than relying on the reporting of trend data alone.

The 2021 assessments also saw, as in previous years, the BBFAW assessors applying a stricter interpretation of the evidence. The assessment and review processes are designed to focus on objective evidence and defined commitments and actions. The assessors reduced a company's score if there was ambiguity in company statements (e.g. uncertainty around scope), where companies had failed to act on recommendations arising from previous BBFAW assessments, or where a company had not provided a reliable account of current practice.

The full 2021 assessment criteria are available on pages 44-65.

The 2021 methodology placed a greater emphasis on companies' performance reporting and performance impact. These changes were in line with the BBFAW's long-held ambition to place increasing emphasis on the performance impact of companies in terms of improved standards of welfare for animals globally.

The 16 companies now occupying Tiers 1 and 2 (23 in 2020) represent all three sub-sectors (Retailers and Wholesalers, Producers and Manufacturers, and Restaurants and Bars) and four geographic regions (Europe, Latin America, North America and UK) covered by the Benchmark. Without changes to the 2021 benchmark methodology, 21 companies would have been in Tiers 1 and 2.

Sixty-six companies (44%) are making progress on implementing their policies and commitments on farm animal welfare, corresponding to Tiers 3 and 4 (68 or 45% in 2020). However, as the Impact Ratings show, many of these companies have a considerable way to go to demonstrate the quality and effectiveness of their management practices in delivering welfare impacts on animals. For instance, 24 out of the 31 companies in Tier 3 achieve an Impact Rating E or F.

Meanwhile, 68 companies (45%) are in Tiers 5 and 6 (59 in 2020). These companies provide little or no information on their approach to farm animal welfare. Strikingly, 27 of the 68 companies (28 in 2020) in the lowest two rankings still do not publish a formal farm animal welfare policy.

In total, 30 companies improved their overall average score in 2021, with six of these companies improving their score sufficiently to increase their ranking by one Tier (see Table 1.3); these achievements are particularly noteworthy given the scale of methodology changes introduced in 2021. Conversely, 36 companies moved down one Tier (see Table 1.4) largely due to the changes in methodology. It is also important to point out that companies whose scoring was close to the lower boundary of a Tier, were more susceptible to marginal differences in scoring.

6

companies have improved by one Tier between 2020 and 2021

Table 1.3: Companies Improving by at Least One Tier between 2020 and 2021

Retailers & Wholesalers	Producers & Manufacturers	Restaurants & Bars
E.Leclerc (Tier 4)	Premier Foods PLC (Tier 1)	
Cencosud (Tier 5)	Maple Leaf Foods (Tier 2)	
	Terrena Group (Tier 3)	
	Industrias Bachoco (Tier 5)	

Table 1.4: Companies Falling by One Tier between 2020 and 2021

Retailers & Wholesalers	Producers & Manufacturers	Restaurants & Bars
Coop Group (Switzerland)/Coop Genossenschaft (Tier 3)	Cranswick PLC (Tier 2)	Mitchells & Butlers PLC (Tier 3)
Woolworths Group (Tier 3)	Danish Crown AmbA (Tier 3)	Whitbread PLC (Tier 3)
Casino Guichard-Perrachon SA (Tier 4)	Fonterra (Tier 3)	Elior Group (Tier 4)
Lidl Stiftung & Co KG (Tier 4)	Hilton Food Group (Tier 3)	JD Wetherspoon PLC (Tier 4)
REWE Group (Tier 4)	Nestlé SA (Tier 3)	McDonald's Corporation (Tier 4)
Schwarz Unternehmens Treuhand KG/Kaufland (Tier 4)	Arla Foods Ltd (Tier 4)	Sodexo (Tier 4)
Costco Wholesale Corporation (Tier 5)	Hormel Foods Corporation (Tier 4)	Camst – La Ristorazione Italiana Soc. Coop. ARL (Tier 5)
Kroger Company (The) (Tier 5)	KraftHeinz (Tier 4)	Darden Restaurants PLC (Tier 5)
METRO AG (Tier 5)	LDC Groupe (Tier 4)	Wendy's Company (The) (Tier 5)
Sysco Corporation (Tier 5)	Royal FrieslandCampina (Tier 4)	Umoe Gruppen AS (Tier 6)
Walmart Inc (Tier 5)	Tyson Foods Inc (Tier 4)	
	Cooperativa Centrale Aurora Alimentos (Tier 5)	
	Ferrero SpA (Tier 5)	
	Gruppo Veronesi (Tier 5)	
	Meiji Holdings (Tier 6)	

Despite the level of corporate and investor attention that has been given to farm animal welfare over the past decade, the 2021 findings indicate that significant work is needed by companies to translate their farm animal welfare commitments into real, measurable welfare improvements for animals.

Disappointingly, there are twelve companies in Tiers 5 and 6 that have been continually assessed as part of the BBFAW since 2012, but which lag significantly behind their industry peers in demonstrating their commitment to farm animal welfare. These lagging companies are Autogrill, Camst La Ristorazione Italiana Soc. Coop. ARL, Gategroup, Groupe Lactalis, Mars, Mercadona, Metro AG, Müller Group, Subway, Starbucks, Umöe Gruppen and Walmart.

Trend Companies 2012-2021

Our analysis of the changes in company Tier rankings between 2012 and 2021 (see Table 1.5) highlights the progress made by the 57 food companies that have been continuously assessed by the BBFAW since 2012, referred to as 'trend companies'. Acknowledging that some companies have moved up and down tiers since 2012, and also noting the changes made to the methodology over this period, the net impact of these movements indicates that 41 companies (72%) have moved up at least one Tier since 2012. Of these, 18 (32%) have moved up one Tier, 17 (30%) have moved up two Tiers and five (9%) have moved up three Tiers. One company has moved up four Tiers since 2012.

Non-trend companies are those companies that have been added to the scope of companies covered by the BBFAW since its launch in 2012. The number of companies included in scope increased by approximately 10 companies per year between 2013 and 2017. Then, in 2018, 40 companies were added, bringing the total to 150 companies.

When analysed by geography, the relative performance of the trend companies in different regions is broadly aligned with the findings from across the total 150 companies included in the 2021 Benchmark, with UK domiciled companies outperforming those in Europe and North America. The average score for UK domiciled trend companies in 2021 is 61%, European domiciled trend companies 38% and North American 35%. Only one of the trend companies is domiciled in Latin America, and achieved a total score of 63%.

When analysed by sub-sector, the average scores for trend companies reflect the relative performance between sub-sectors identified by the 2021 Benchmark. The average score for Producer and Manufacturer trend companies in 2021 is 51% compared to 27% for non-trend companies in this sub-sector; for Retailer and Wholesaler trend companies, the average score is 50% compared to 23% for non-trend companies in this sub-sector; and for Restaurant and Bar trend companies the average score is 33% compared to 20% for non-trend companies in this sub-sector. In 2012, the overall average score was 23%. Notwithstanding the evolving methodology of the Benchmark in the subsequent nine years, the average score for the 57 trend companies in 2021 at 45% demonstrates significant improvement in the way that these companies have incorporated farm animal welfare into their management and disclosure practices. Indeed, significant improvement in scores has been seen across all pillars of the assessment, with trend companies achieving overall average scores in 2021 of 65% for the Management Commitment section (29% in 2012); 59% for the Governance and Management section (19% in 2012), and 61% for the Leadership and Innovation section (18% in 2012).

The Performance Reporting and Impact section was introduced to the BBFAW assessment in 2014 and incorporated into company scores for the first time in 2015. The average score for the entire Performance Reporting and Impact section for the trend companies in 2021 is 25% (10% in 2015). The average score for trend companies on the 10 Performance Impact questions within this section in 2021 is 21% compared to just 6% for the 93 non-trend companies covered by the 2021 Benchmark.

With an overall average score of

45%

the 57 trend companies demonstrably outperform the 93 non-trend companies, whose overall average score is just 24%.

Table 1.5: Tier Changes 2012 – 2021 (Trend Companies)

Down 1 Tier	No Tier change	Up 1 Tier	Up 2 Tiers	Up 3 Tiers	Up 4 Tiers
McDonald's Corporation (Tier 4) Subway/Doctor's Associates Inc (Tier 5)	Arla Foods Ltd (Tier 4) Autogrill SpA (Tier 6) Co-op (UK) (Tier 2) Coop Group (Switzerland) /Coop Genossenschaft (Tier 3) Gategroup Holding AG (Tier 6) Groupe Lactalis (Tier 5) ICA Gruppen AB (Tier 4) METRO AG (Tier 5) Müller Group AG (Tier 6) Royal FrieslandCampina (Tier 4) Starbucks Corporation (Tier 5) Tyson Foods Inc (Tier 4) Umoe Gruppen AS (Tier 6) Unilever NV (Tier 2)	Camst – La Ristorazione Italiana Soc. ARL (Tier 5) Compass Group PLC (Tier 3) Danish Crown AmbA (Tier 3) J Sainsbury PLC (Tier 2) JD Wetherspoon PLC (Tier 4) Lidl Stiftung & Co KG (Tier 4) Mars Inc (Tier 5) Mercadona SA (Tier 5) Migros-Genossenschafts-Bund (Tier 3) Mitchells & Butlers PLC (Tier 3) Noble Foods (Tier 1) REWE Group (Tier 4) Schwarz Unternehmens Treuhand KG/ Kaufland (Tier 4) SSP Group (Tier 5) Vion Food Group (Tier 3) Walmart Inc (Tier 5) Whitbread PLC (Tier 3) Wm Morrison Supermarkets PLC (Tier 2)	2 Sisters Food Group (Boparan Holdings Ltd) (Tier 3) ALDI Süd/ALDI Einkauf SE & Co. oHG (Tier 3) Aramark Corporation (Tier 4) Associated British Foods PLC (Tier 4) Carrefour SA (Tier 3) Casino Guichard-Perrachon SA (Tier 4) Cranswick PLC (Tier 2) Cremonini SpA (Tier 4) Elior Group (Tier 4) Groupe Danone SA (Tier 2) Marfrig Global Foods SA (Tier 2) Marks & Spencer PLC (Tier 1) Nestlé SA (Tier 3) Sodexo (Tier 4) Terrena Group (Tier 3) Tesco PLC (Tier 2) Yum! Brands Inc (Tier 3)	Barilla SpA (Tier 2) Cargill (Tier 2) Elo Group (Tier 3) Greggs PLC (Tier 2) Waitrose (Tier 1)	Premier Foods PLC (Tier 1)
2	14	18	17	5	1

Sub-sector Comparison

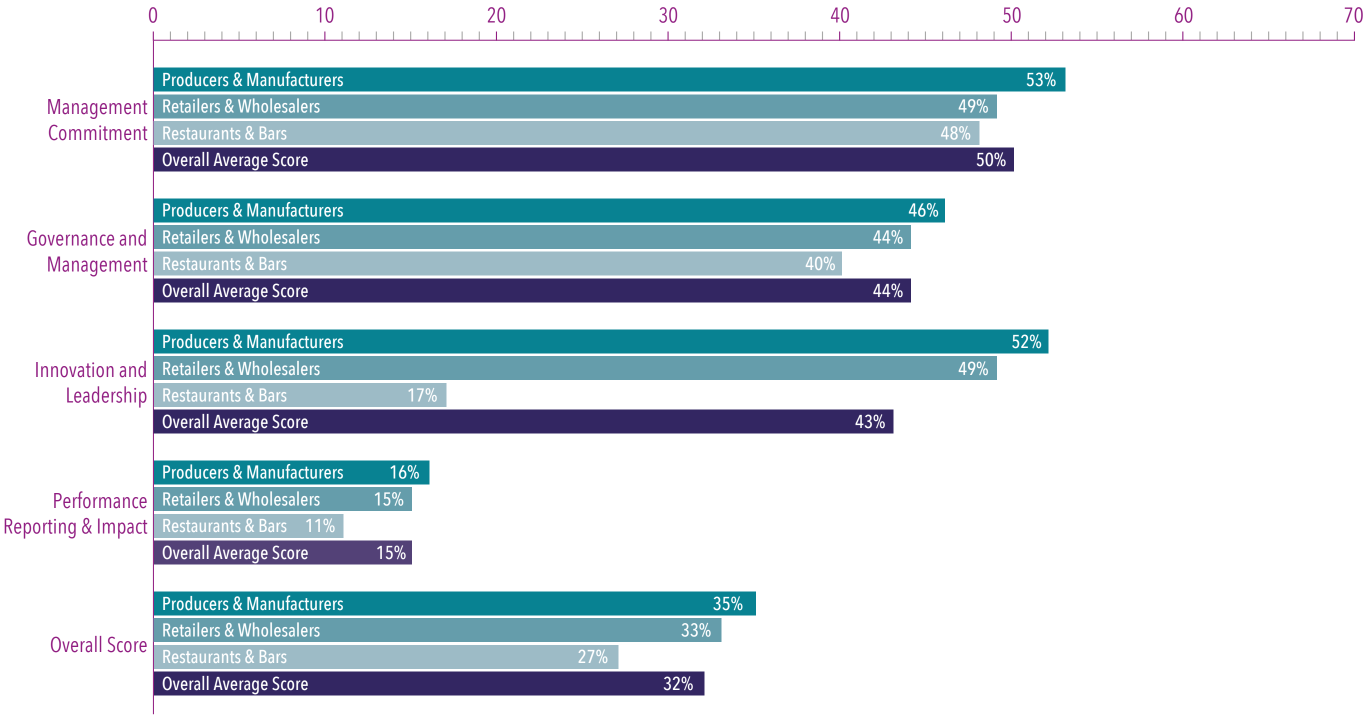
Changes to the overall average score in 2021 have impacted all sub-sectors equally. The overall average score for Retailers and Wholesalers is 32% (36% in 2020), compared with an average score of 27% for Restaurants and Bars (31% in 2020), and 35% for Producers and Manufacturers (38% in 2020) (see Figure 1.2). Relative scores have not changed, with Producers and Manufacturers achieving a higher overall average score than the other two sub-sectors.

Four of the six companies rising a tier in 2021 are Food Producers and Manufacturers. Meanwhile, of the 30 companies who increased their overall score in 2021, 15 are Food Producers and Manufacturers (compared to nine Retailers and Wholesalers and six Restaurants and Bars). This shows a continuation of the trend seen in 2020, when Food Producers and Manufacturers also showed the most significant improvement in overall score of all three sub-sectors.

Food Producers and Manufacturers continue to be the most represented sub-sector in Tiers 1 and 2 of the Benchmark, with nine companies showing leadership on farm animal welfare compared to six Retailers and Wholesalers and one Restaurants and Bars company. These companies – Noble Foods, Barilla SpA, Cargill, Cranswick, Groupe Danone, Maple Leaf Foods, Marfrig Global Foods SA, Premier Foods PLC and Unilever NV – which include five Producers and four Manufacturers, represent four of the five geographic regions covered by the Benchmark. Asia Pacific is not yet represented in Tiers 1 or 2.

Our analysis shows that Producers and Manufacturers in Latin America, with an average score of 37%, are for the second consecutive year outperforming Producers and Manufacturers in North America, whose overall average score was 31% (down from 35% in 2020). Although this finding is based on the performance of just 18 North American companies and eight Latin American companies – Agro Super, Cooperativa Centrale Aurora Alimentos, Industrias Bachoco, BRF, JBS, Marfrig Global Foods and Minerva Foods – these companies include some of the largest meat producers globally.

Figure 1.2 Sub-sector Comparison 2021



Global Perspective

The global picture of company performance across the five regions covered by the BBFAW (Asia Pacific, Europe excluding the UK, Latin America, North America; and the UK) is similar to 2020, with UK domiciled companies achieving the highest overall average score across all regions at 59% (64% in 2020).

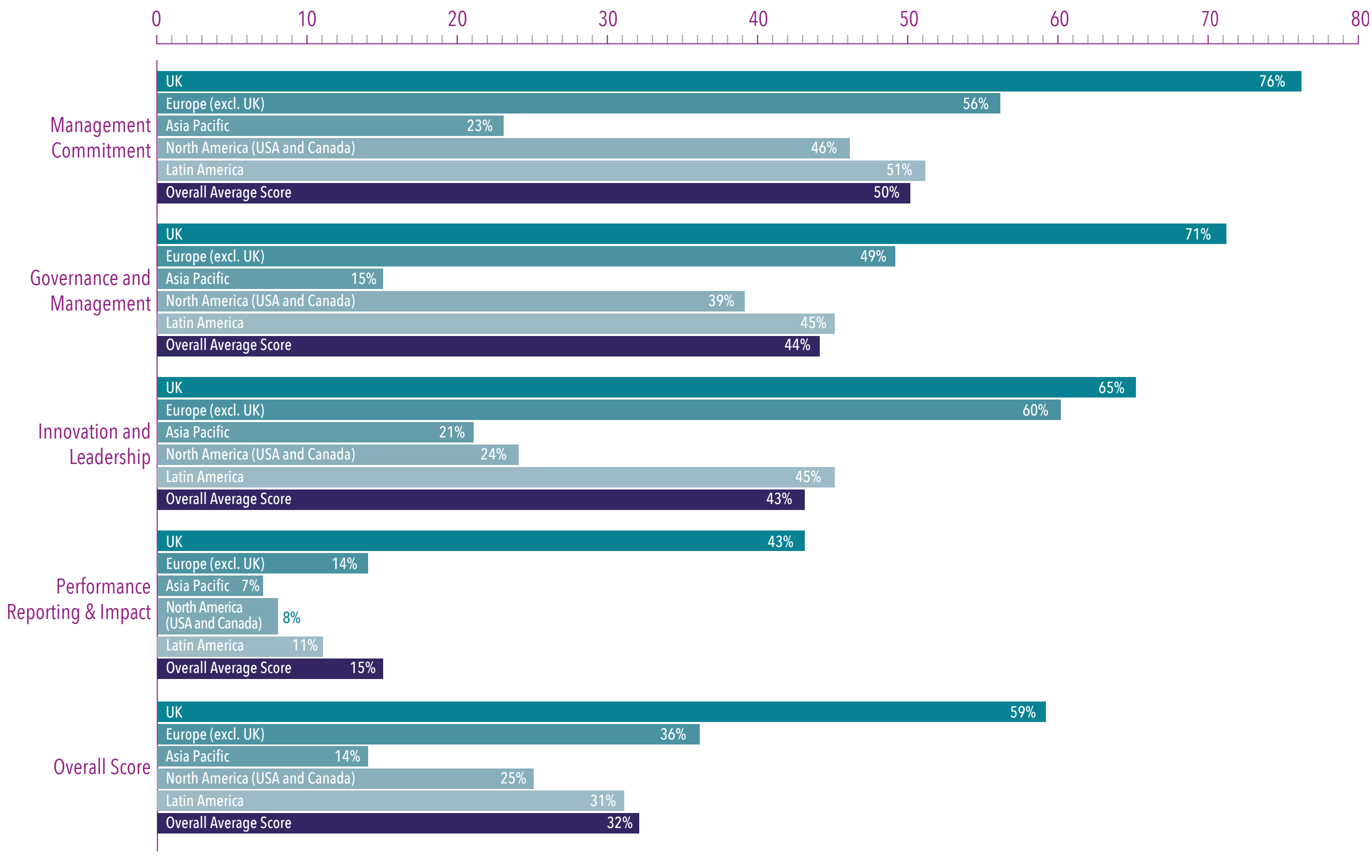
As shown in Figure 1.3, UK companies achieved the highest average score across all sections of the Benchmark. For instance, the UK Food Retailers and Wholesalers sub-sector achieved the highest average score in the Governance and Management section, where they achieved an average score of 78% (88% in 2020) and Performance Reporting and Impact, where they achieved an average score of 51% (55% in 2020). Meanwhile, the UK Restaurants and Bars sub-sector achieved the highest average score in the Management Commitment and Policy section at 84% (85% in 2020).

The second highest-scoring region was Europe (excluding the UK), which achieved an overall average score of 36% (40% in 2020). Within this region, the Food Producers and Manufacturers and Food Retailers and Wholesalers sub-sectors achieved overall average scores of 41% (44% in 2020) and 38% (42% in 2020) respectively, compared to the Restaurants and Bars sub-sector in Europe, which achieved an overall average score of just 20% (26% in 2020).

The overall average score for companies in Latin America was 31% (32% in 2020) compared to 25% for companies in North America (29% in 2020). This is the second consecutive year that Latin America has outperformed the overall average score for companies in North America. The overall average score for companies in Asia Pacific was 14% (15% in 2020).

Looking back to the first Benchmark in 2012, company performance has improved across all regions. In 2012, the average score for UK domiciled companies was 36%, compared to 59% in 2021. For European domiciled companies, the average score has improved from just 16% in 2012 to 36% in 2021, and for North American companies, from 20% in 2012 to 25% in 2021. There was only one Latin American company in the 2012 Benchmark, and they scored 36% in 2012, compared to 63% in 2021.

Figure 1.3 Geographic Comparison 2021



2. The 2021 Benchmark Results in Detail

Farm Animal Welfare Policies

One hundred and thirty-four (89%) of the 150 companies covered by the 2021 Benchmark now acknowledge farm animal welfare as a relevant business issue, compared to 71% of the 68 companies evaluated in the first BBFAW Benchmark in 2012. Furthermore, 122 companies (81%) have formal overarching policies on farm animal welfare, compared to 46% of companies in 2012. Despite the significant advancements seen in the number of companies publishing formal management commitments to farm animal welfare over the past decade, it is of concern that 28 companies have not published overarching policies on farm animal welfare.

Since 2012, almost

90%

of companies now acknowledge farm animal welfare as a business issue.

As well as measuring the proportion of companies publishing formal policies on farm animal welfare, we are also interested to understand the scope of these policies and whether they comprehensively cover the scope of companies' geographic, species and product footprint. Fifty-nine percent of companies have farm animal welfare policies that lack universal coverage, with their scope being either poorly defined or limited to specified geographies, species and/or products (see Figure 2.1). In practice, companies tend to prioritise those species and issues on which they can have the most significant impact, where they can have the most influence and where there is the greatest level of public or consumer attention.

Figure 2.1: Scope of Formal Animal Welfare Policies

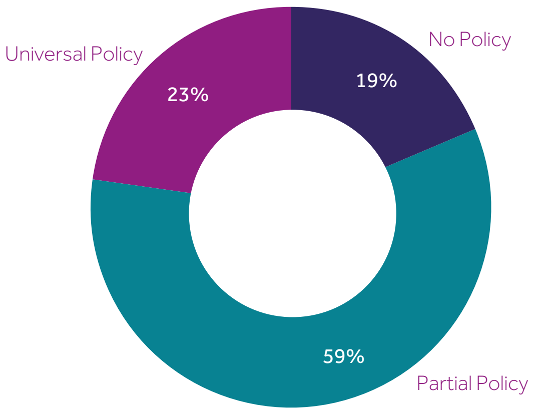


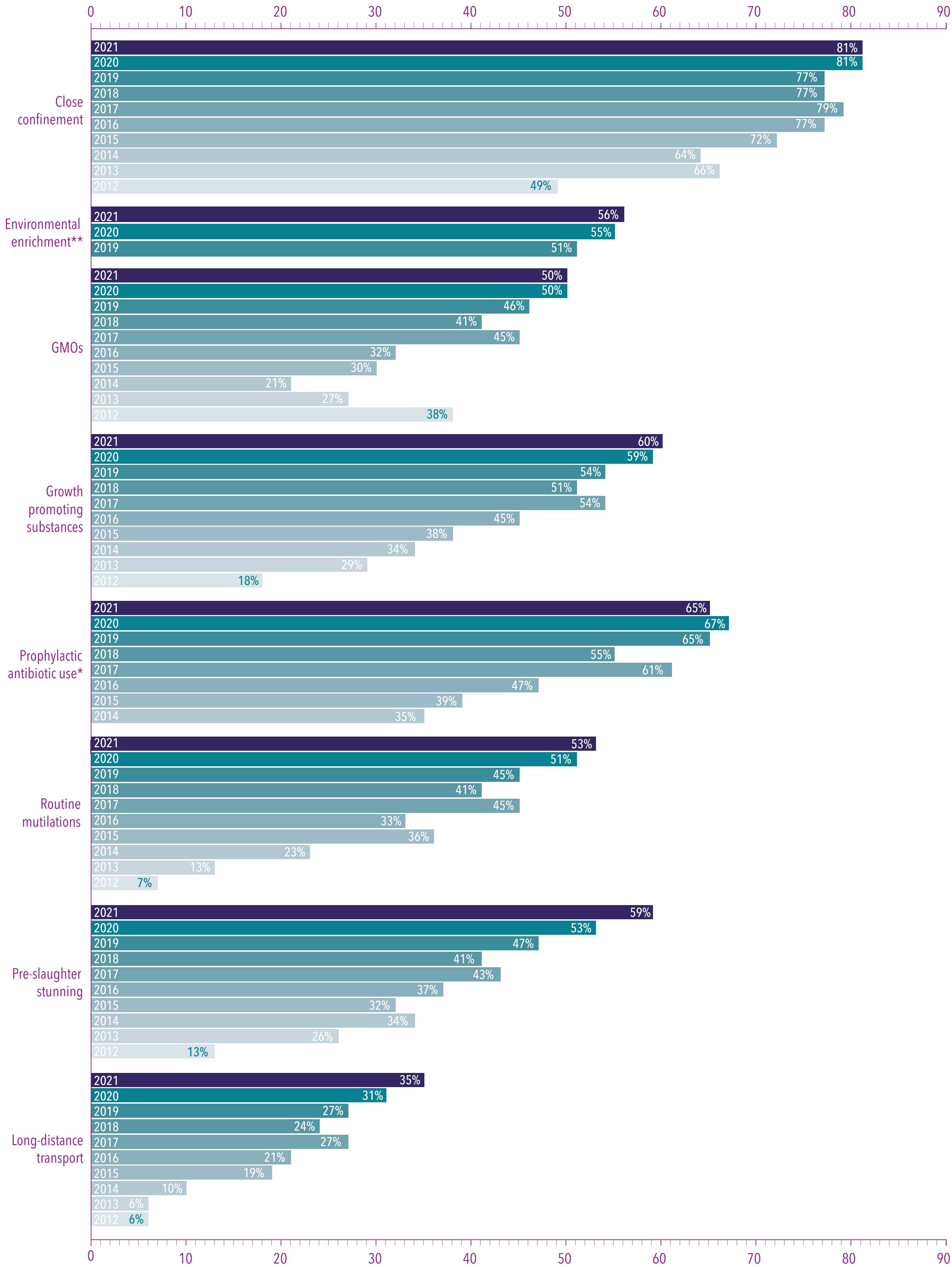
Figure 2.2 shows the proportion of companies with management commitments addressing the eight key welfare topics assessed in the Benchmark.[2]

The number of companies with published positions on key animal welfare issues continues to grow, with almost all welfare issues showing a year-on-year upward trend in the proportion of companies reporting formal positions. However, it is important to point out that many of the companies publishing management commitments on key welfare topics achieve only partial scores due to the fact that their commitments are limited to, for example, specific practices (e.g. the avoidance of teeth clipping of pigs but not of other mutilations on pigs), or to specific species, geographies or products.

In 2021, the most significant increases are seen in companies' commitment to pre-slaughter stunning, with 59% of companies stating their position on this issue compared to 53% in 2020; routine mutilations, with 53% of companies with formal positions compared to 51% in 2020; and long-distance transport, where 35% of companies now have formal positions compared to 31% in 2020.

The most actively supported welfare position continues to be the avoidance of close confinement for all species and the reduction or elimination of routine antibiotics, followed by company commitments on the avoidance of growth promoting substances and the avoidance of animals that have not been pre-slaughter stunned. These areas of focus are consistent with our findings in 2020, suggesting that companies are continually responding to demands for improved welfare being placed on them by their customers and consumers, by industry peers, by regulatory requirements, and by the campaigning efforts of animal welfare organisations.

Figure 2.2: Proportion of Companies with Specific Policies on Farm Animal Welfare Issues



*Reported for the first time in 2014

**Reported for the first time in 2019

This is the second year in which we have included the scores from a relatively new policy question[3] relating to the provision of species-specific environmental enrichment. This question reflects growing recognition of the importance of providing animals with stimulating and complex environments that enable species-specific behaviours. Such enrichment can include, for example, brushes for dairy cows, manipulable materials such as straw for pigs, pecking and dustbathing substrates and perches for chickens. However, of the 84 companies (56%) making commitments to provide species-specific environmental enrichment (see Figure 2.4), only 50 (33%) companies had made clearly defined but partial commitments and just one company had made universal commitments across all relevant geographies, species and products. Indeed, of all the key welfare topics assessed in the Benchmark, environmental enrichment has the lowest proportion of companies with defined commitments, suggesting the relative immaturity and lack of understanding of this topic by food businesses.

It continues to be the case that relatively few management commitments are universal in scope (i.e. covering all geographies, all species and all products). The key welfare topics with the greatest proportion of companies scoring maximum points for adopting universal commitments are: the avoidance of genetically modified or cloned animals (19% of companies) (Figure 2.6), the avoidance of animals that have not been stunned prior to slaughter (11% of companies) (Figure 2.8), the avoidance or reduction of the routine use of antibiotics (11% of companies) (Figure 2.7).

Figure 2.3: Commitment to the Avoidance of Close Confinement

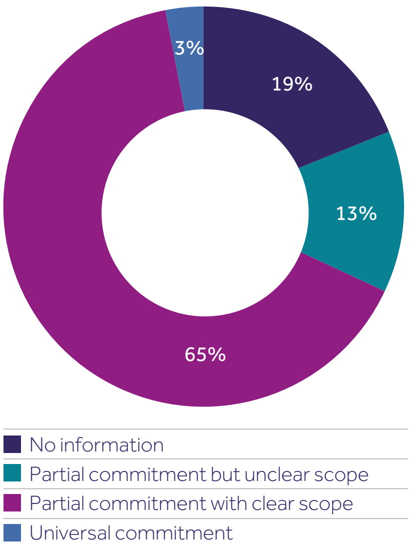


Figure 2.4: Commitment to Requiring the Provision of Environmental Enrichment

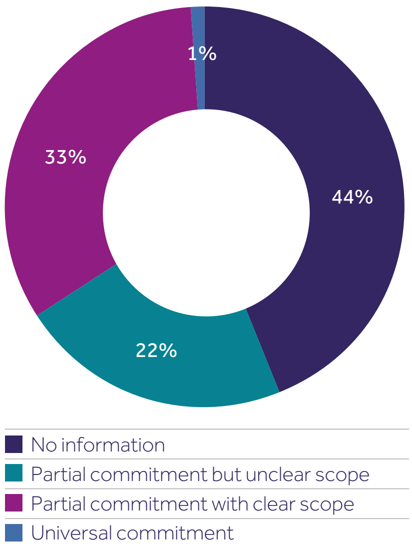


Figure 2.5: Commitment to the Avoidance of Growth Promoting Substances

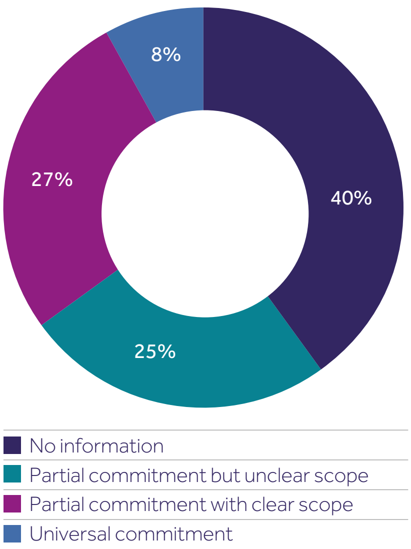


Figure 2.6: Commitment to the Avoidance of Genetically Modified and Cloned Animals

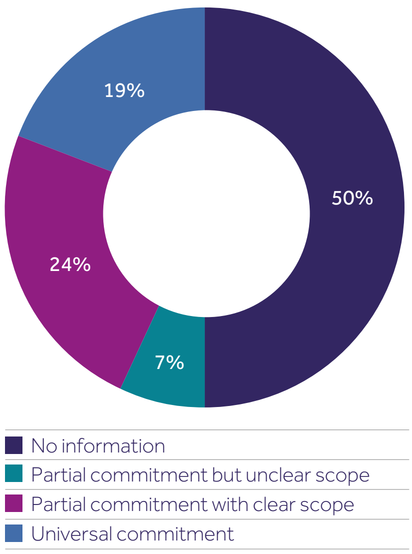


Figure 2.7: Commitment to the Reduction or Avoidance of Antibiotics

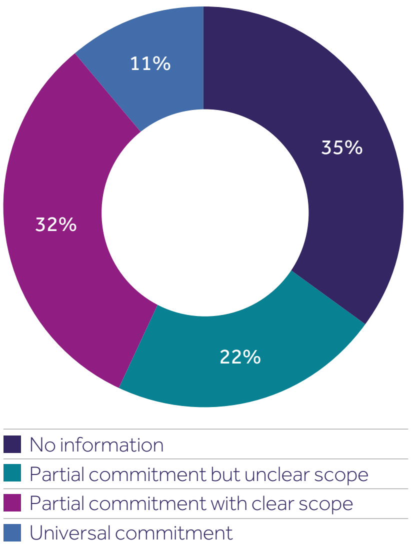


Figure 2.8: Commitment to Requiring Pre-slaughter Stunning

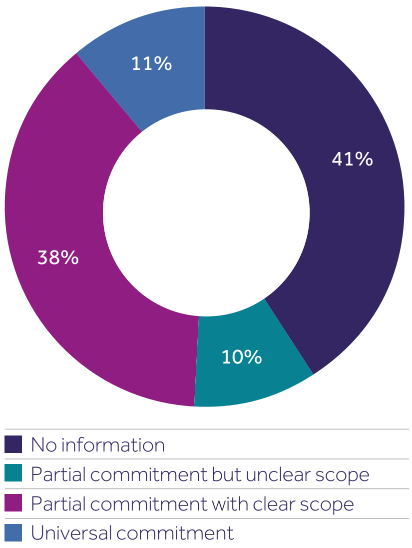


Figure 2.9: Commitment to the Avoidance of Long-distance Transportation

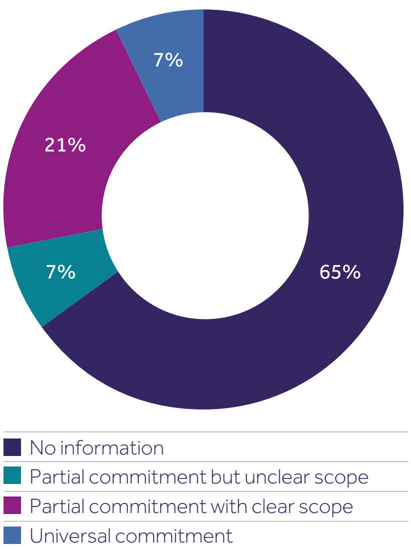
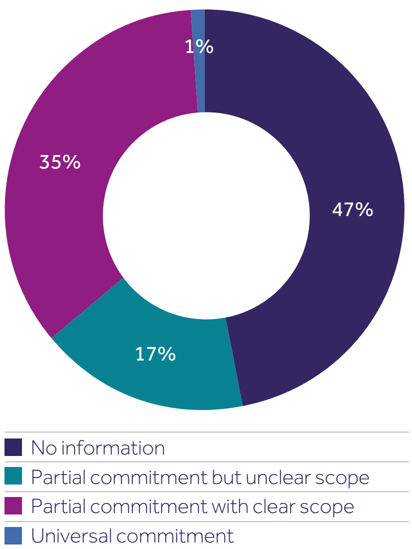


Figure 2.10: Commitment to the Avoidance of Routine Mutilations



Governance and Management

We continue to see year-on-year improvements in the way in which companies are strengthening their internal governance and management processes for ensuring the effective implementation of company policies. For instance, 80 companies (53%) now describe their provision of employee training on animal welfare (49% in 2020), and 84 (56%) describe the actions taken in the event of non-compliance with their farm animal welfare policies (55% in 2020). This is encouraging given that performance in these two areas has historically lagged other Governance and Management topics.

Scores on other Governance and Management topics have remained static since 2020. For example, 77 companies (51%) have assigned senior management oversight of farm animal welfare and 119 companies (79%) have published formal objectives and targets for animal welfare. However, when compared with the first Benchmark in 2012, where just 22% of companies reported on senior management oversight of farm animal welfare and only 26% had published formal improvement objectives for farm animal welfare, it is clear to see the significant improvement that has been made in companies' governance of farm animal welfare.

The scores achieved within the Governance and Management section of the Benchmark reveal differing approaches across the company sub-sectors. Whereas 68% (66% in 2020) of Restaurants and Bars companies report that they include farm animal welfare in supplier contracts, only 26% (26% in 2020) provide any support and/or education to suppliers on farm animal welfare. This contrasts with Producers and Manufacturers, where 52% of companies in this sub-sector (48% in 2020) include farm animal welfare in supplier contracts and 62% (57% in 2020) provide associated support and/or education to suppliers. The equivalent findings for Retailers and Wholesalers are 55% (54% in 2020) and 47% (46% in 2020) respectively. These findings are perhaps not surprising given that Producers and Manufacturers are more likely to be operating shorter or less complex supply chains than Retailers and Wholesalers or Restaurants and Bars.

Key findings:

- 64% of companies (63% in 2020) report some information on assigned management responsibilities for farm animal welfare, at either or both senior management and operational levels.
- 79% of companies (79% in 2020) have set farm animal welfare-related objectives and targets.
- 57% of companies (54% in 2020) report that they include farm animal welfare in supplier contracts.
- 71% of companies (67% in 2020) describe how they monitor and audit the implementation of their farm animal welfare policies.
- 53% of companies (49% in 2020) report on providing animal welfare training to their employees.
- 56% (55% in 2020) report on having internal controls for managing non-compliance with their farm animal welfare policies.

Question 14 was changed in 2021 to encourage companies to provide explanations of progress against objectives and targets, rather than simply reporting trend data. Through this change, the BBFAW is seeking evidence that companies have effective systems in place for monitoring progress against their objectives and targets and are actively using these insights to inform or adapt their management approach to deliver on their stated aims.

Whilst

119

companies (79%) have set farm animal welfare-related objectives and targets, only 63 companies (42%) provide an explanation of progress against these.

Innovation and Leadership

Advancing Farm Animal Welfare in the Food Industry

Companies have an important role to play in supporting research and development programmes to improve farm animal welfare, helping ensure that these are focused on delivering results that can achieve welfare impacts for animals in food industry supply chains. The collective involvement of companies and other stakeholders, such as governmental and industry organisations, NGOs and academia, in industry initiatives aimed at improving farm animal welfare is another powerful driver of change. Initiatives focused on developing the right policy frameworks, incentives, knowledge and understanding across the industry are important to ensuring that improved practices are adopted across the industry.

Forty-one percent (40% in 2020) of the 150 companies covered by the Benchmark now describe their involvement in research and development programmes and 44% (48% in 2020) report that they are involved in industry initiatives directed at improving farm animal welfare. Fifty-four percent of Producers and Manufacturers and 42% of Food Retailers and Wholesalers report on their involvement in research and development projects, compared to just 18% of Restaurant and Bar companies.

Examples of research initiatives include:

- A European retailer trialling a new dual-purpose broiler chicken breed.
- An Asian producer developing improved pig handling measures to reduce stress during loading and transport.
- A European producer conducting research into environmental enrichment for cleaner fish species used in Atlantic Salmon production.

This year, some companies lost points due to a lack of current, or sufficiently detailed, reporting on their involvement in research and development projects, with a number of companies citing historical research projects or failing to provide updates on existing projects. Furthermore, a higher proportion of companies lost points on their reporting on industry initiatives aimed at advancing farm animal welfare. Here, a number of companies did not provide sufficient detail on the specific role their company was fulfilling as part of an industry initiative, or they cited industry initiatives that did not have a clear and focused commitment to improving farm animal welfare.

Customer and Consumer Engagement

Food companies have an important role to play in promoting higher farm animal welfare standards to customers (both business customers and consumers). The provision of information on farm animal welfare is important at all levels of the food supply chain if companies are to play a role in driving greater awareness, demand and support for higher welfare products.

Overall, the 2021 Benchmark data suggest that the proportion of companies promoting higher farm animal welfare to customers has remained broadly unchanged. Seventy-eight companies (52%) provide some information to their customers on farm animal welfare (53% in 2020), with 60% of Food Producers and Manufacturers and Food Retailers and Wholesalers respectively reporting on their efforts to engage consumers. As with previous years, companies in the Restaurants and Bars sub-sector significantly lag their industry peers on this issue, with just 24% of companies in this sub-sector scoring points for their customer or consumer communications on farm animal welfare.

Farm Animal Welfare Performance

The Performance Reporting and Impact section was introduced to the BBFAW assessment in 2014 and incorporated into company scores for the first time in 2015. Despite this, company scoring in the Performance Reporting and Impact section remains very low, with an overall average score of just 15% (14% in 2020). Performance reporting on farm animal welfare is neither comprehensive (i.e. the scope of reporting is limited to specified geographies, species or products) nor clearly defined. Analysing the scoring by sub-sector shows that Food Producers and Manufacturers achieve a marginally higher average score of 16% in this section, compared to the average score for Food Retailers and Wholesalers at 15%, and Restaurants and Bars at 11%.

Performance Disclosure by Welfare Issue

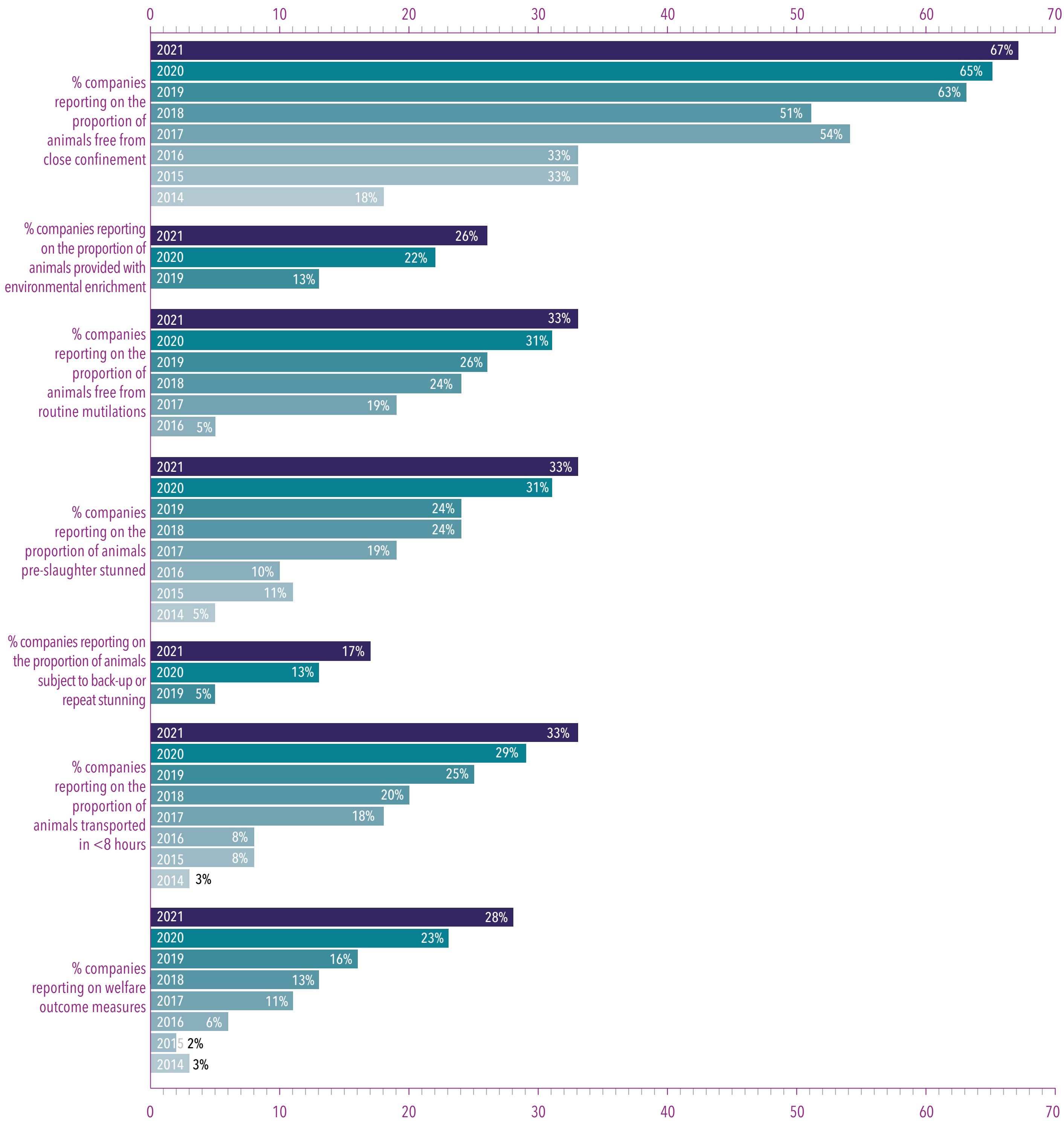
Figure 2.11 summarises company scoring across the seven Performance Reporting questions (Questions 20-26), which appear in the first half of the Performance Reporting and Impact section. These questions relate to all species managed by companies across all geographies and all products and cover: the proportion of animals free from close confinement, the proportion of animals provided with effective species-specific environmental enrichment, the proportion of animals free from routine mutilations, the proportion of animals pre-slaughter stunned, the proportion of animals subject to repeat-stun, the proportion of animals transported in eight hours or less, and the extent that companies report on welfare outcome measures, partially or fully.

Reporting on the proportion of animals free from close confinement (across laying hens, broiler chickens, pigs and dairy cattle) remains the highest reported topic, with 100 companies (67%) reporting at least some data (65% in 2020). However, the majority of performance reporting on this topic remains limited to specified countries, species or product lines, with only seven companies (5%) providing universal data.

Other findings:

- 49 companies (33%) report some data on the proportion of animals transported in eight hours or less (29% in 2020), with only eight companies (5%) providing universal data.
- 42 companies (28%) report welfare outcome measures for specific species (e.g. lameness rates in pigs, feather cover in laying hens, and sea lice infection rates in farmed fish) (23% in 2020). Given the importance of welfare outcome measures for evaluating the performance of farm animal welfare systems and practices, this issue remains significantly under-reported with 108 companies reporting no data at all.
- 39 companies (26%) report some data on the proportion of animals provided with species-specific enrichment (22% in 2020), with only four companies (3%) providing universal data.

Figure 2.11 Proportion of Companies Reporting on Performance 2014-2021



Note: Performance Reporting questions were introduced in 2014, with additional questions introduced in 2016, 2018 and 2019.

Performance Impact

In line with BBFAW's objective to place increasing emphasis on welfare impact, the weighting of the Performance Impact questions has been increased in increments over the past five Benchmark cycles: from 24% of total points (in 2017) to 35% (2018 to 2020) to 45% in 2021. Meanwhile, since 2020, adjustments have been made to the weighting of the 10[4] Performance Impact questions to represent 60% of the available points in this Performance Reporting and Impact section.

As part of the changes to the methodology in 2021, a further adjustment was made to the scoring of the Performance Impact questions, to award more than minimum points to companies who reported partial but substantial progress on the welfare impacts for animals in their global supply chains.

Some examples:

- A company reporting that 100% of laying hens in its European operations were cage-free, would previously have been awarded minimum points if the company was unable to state what proportion of global supply this data related to. Under the revised methodology, the company scored additional points for achieving substantial progress, even though this was limited in geographic scope.
- A company reporting that 70% of fresh pork globally was from sows that were free from sow-stalls after the first four weeks of pregnancy would previously have been awarded minimum points because the product scope was limited to fresh meat (and, therefore, did not include cured, frozen or ingredient products). Under the revised methodology, the company scored additional points for achieving substantial progress, even though this was limited in product scope.

Recognising that company disclosure on performance impact is significantly under-developed, the aim of this scoring adjustment was two-fold. First, it presented an opportunity to incentivise companies who had yet to report on their performance impact by encouraging them to make substantial progress in one part of the business, even if this was limited by geographic or product scope. Second, it presented an opportunity to recognise those companies already reporting substantial yet partial impact data more fairly.

Overall, 67 companies benefitted from the new scoring for reporting Performance Impacts that were partial but substantial, and there were 185 instances where companies received three points for such reporting. The new scoring had a marginal impact on company scores, with an average uplift on the overall score of +0.67%.

Impact Rating

The Impact Rating tool supports the BBFAW's long-term objective to improve the welfare of animals in the global food system. Introduced in 2020, the Impact Rating is designed to help investors and other stakeholders better assess the effectiveness of a company's management systems in delivering welfare improvements on the ground.

Individual company ratings were introduced but not publicly disclosed in 2020 and were shared with individual companies on a confidential basis. At the time, companies were notified of the BBFAW's intention to publish company Impact Ratings from 2021.

The Impact Rating is calculated using the scores achieved by companies across the 10 Performance Impact questions. Eight of the 10 questions assess companies on species-specific performance for the most numerously sourced animals (excluding fish) worldwide (namely laying hens, broiler chickens, dairy cows and pigs). These species-specific questions focus on key welfare issues covering close confinement, routine mutilations and, in the case of broiler chickens, fast growing breeds. Two additional questions focus on pre-slaughter stunning (of all species) and long-distance live transportation (excluding fish) for the species relevant to a company's operations and supply chains.

The Impact Rating (see Table 2.1) highlights that performance impact is not at the level we would expect it to be given the level of corporate and investor attention afforded to farm animal welfare over the past decade.

Table 2.1: 2021 Impact Ratings

Impact Rating		Company
A >80%	These companies are declaring improved welfare impacts for a reasonable proportion of farm animals in their operations and/or supply chains.	
B 62-80%		Greggs PLC, Marks & Spencer PLC, Noble Foods, Premier Foods PLC, Waitrose
C 44-61%	These companies are declaring improved welfare impacts for at least some farm animals in their operations and/or supply chains.	Cargill, Cranswick PLC, Fonterra, Groupe Danone SA, Nestlé SA, Tesco PLC
D 27-43%		2 Sisters Food Group (Boparan Holdings Ltd), Barilla SpA, BRF SA, Co-op UK, Coles Group, Danish Crown AmbA, Domino's Pizza Group PLC, J Sainsbury PLC, Maple Leaf Foods, Unilever NV, Marfrig Global Foods SA, Wm Morrison Supermarkets PLC
E 11-26%	These companies have yet to demonstrate that they are delivering improved welfare impacts for farm animals in their operations and/or supply chains.	ALDI Nord (ALDI Markt), ALDI Süd/ALDI Einkauf SE & Co, Carrefour SA, Casino Guichard-Perrachon SA, Charoen Pokphand Foods (CPF), Cheesecake Factory (The), Chipotle Mexican Grill, Compass Group PLC, Coop Group (Switzerland)/Coop Genossenschaft, EG Group, Elo Group, Hershey Co, Hilton Food Group, ICA Gruppen AB, IKEA (Inter IKEA Group), Jeronimo Martins, Les Mousquetaires, Mars Inc, Migros-Genossenschafts-Bund, Mitchells & Butlers PLC, Perdue Farms, Royal FrieslandCampina, Whitbread PLC, Woolworths Limited, Yum! Brands Inc
F <11%		Aeon Group, Agro Super, Ahold Delhaize, Albertsons, Alimentation Couche-Tard, Amazon/Whole Foods Market, Aramark Corporation, Arla Foods Ltd, Associated British Foods PLC, Autogrill SpA, Bimbo, BJ's Wholesale Club Holdings, Bloomin' Brands Inc, C&S Wholesale, Campbell Soup Company, Camst – La Ristorazione Italiana Soc. Coop. ARL, Cencosud, Chick-fil-A, China Resources Vanguard, China Yurun Group Limited, Chuying Agro-Pastoral Group, CKE Restaurants, CNHLS, Colruyt, Conad Consorzio Nazionale, ConAgra, Cooke Seafood Inc, Coop Italia, Cooperativa Centrale Aurora Alimentos, Coopérative U Enseigne, Cooperl Arc Atlantique, Costco Wholesale Corporation, Cracker Barrel, Cremonini SpA, Dairy Farmers of America, Darden Restaurants PLC, Dico's/Ting Hsin International Group, E.Leclerc, EDEKA Group, Elior Group, Empire Company/Sobey's, Ferrero SpA, Gategroup Holding AG, General Mills Inc, Groupe Lactalis, Gruppo Veronesi, H E Butt Company, Habib's, Hormel Foods, Corporation, Industrias Bachoco, Inspire Brands Inc, JAB Holding Company, JBS SA, JD Wetherspoon PLC, Kerry Group, KraftHeinz, Kroger Company (The), LDC Groupe, Lianhua Supermarket Holdings Co ,Lidl Stiftung & Co KG, Loblaw Companies Limited, Maruha Nichiro, McDonald's Corporation, Meiji Holdings, Mercadona SA, METRO AG, Minerva Foods, Mondelēz International, Mowi ASA, Müller Group AG, New Hope Liuhe Co Ltd, Nippon Ham, OSI Group, Papa John's Pizza, Plukon Food Group, Publix Super Markets Inc, Restaurant Brands International, REWE Group, Sanderson Farms, Saputo Inc, Schwarz Unternehmens Treuhand KG/Kaufland, Seaboard Corp, Seven & i Holdings, Sodexo, SSP Group, Starbucks Corporation, Subway/Doctor's Associates Inc, Sysco Corporation, Target Corporation, Terrena Group, Tönnies Group, Tyson Foods Inc, Umoe Gruppen AS, UNFI, US Foods, Vion Food Group, Walmart Inc, Wendy's Company (The), Wens Foodstuff Group, WH Group Ltd, Yonghui Superstores Co Ltd, Zhongpin Inc

Whilst 102 (68%) of the 150 companies (66% in 2020) covered by the Benchmark now score some points within the 10 Performance Impact questions, the overall average score for these questions is just 12% (a marginal increase from 8% in 2020). The large distribution of companies in the lower Impact Rating bands underlines the immaturity of this area of company performance and highlights the need for significant progress by companies to demonstrate the quality and effectiveness of their management practices in delivering welfare improvements for animals.

An example of the lack of emphasis on performance is illustrated in the Performance Impact questions related to close confinement (covering the proportion of laying hens free from cages, the proportion of broiler chickens reared at stocking densities of 30 kg/m^2 or less, the proportion of sows free from sow stalls/gestation crates, and the proportion of dairy cattle free from tethering). Whilst 100 companies (67% of the 150 companies) report some data on these questions (65% in 2020), much of the data is partially reported and is limited by geography or product type (e.g. fresh product only). The most widely reported Performance Impact data relates to laying hens where 88 companies (62% of companies with laying hens in their supply chain) report some data. Even here, only around one in four (26%) of these companies reports any significant impact, namely that 60% or more of the laying hens in their global supply chains are cage-free.

Whilst

30

companies have improved their Impact Rating between 2020 and 2021, the overall average score for the 10 questions on which the Impact Rating is based, is just 12%.

Key findings:
While overall average scores on the 10 Performance Impact questions remains very low, there are some early signs of progress. For example:

- Thirty companies have improved their Impact Rating since 2020.
- Twenty-six companies (19% of those with broiler chickens in their supply chain) report on the proportion of broiler chickens from strains of birds with improved welfare outcomes and with a slower growth potential. This is an increase from 11% in 2020.
- Twenty companies (14%) report on the proportion of laying hens that is free from beak trimming, compared to 11% in 2020.
- Thirty-seven companies (26% of those with dairy cows in their supply chain) are reporting on the proportion of dairy cows that is free from tail docking, compared to 19% in 2020.
- Fifty-one companies (34%) report on the proportion of animals (including fin fish) in their global supply chains that is pre-slaughter stunned, compared to 31% in 2020.

3. Accelerating Impact

In addition to producing the annual Benchmark, the BBFAW programme works further to address the challenges and issues identified in this report, and to encourage the changes – in policies, in management systems, in reporting, and in performance – that we think are needed to respond to these challenges.

The Company and Investor Perspective

Company engagement is central to the Benchmark process. Throughout the year, the BBFAW partners and the BBFAW secretariat have engaged with more than half of the companies covered by the Benchmark – through one-on-one meetings and calls, and through online group events. In addition, 49 of the 150 companies assessed provided comments on their draft 2021 assessments and 24 of the 150 companies responded to the BBFAW annual company survey on their animal welfare approaches, on proposed changes to the Benchmark and on the role being played by the BBFAW in driving change in their farm animal welfare policies, practices and performance.

The Secretariat continues to have a high and active level of engagement with investors. It has worked closely with investors since 2011[5] to ensure that the Benchmark and associated tools remain relevant to investors, and to help the investment industry catalyse change in the manner in which companies manage farm animal welfare through their investment decision-making and their engagement with companies.

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

- It provides companies with guidance and clear expectations on how to structure their management processes and reporting.
- It helps companies to understand the expectations and interests of key stakeholders (e.g. clients, customers, investors).
- It enables companies to benchmark themselves against their industry peers. This helps senior management understand the company's overall performance and can support the internal case for action and for investment.
- It enables comparisons to be made between internal business units and product lines, enabling strengths and weaknesses to be identified.
- It is used by investors to assess the business risks and opportunities of farm animal welfare for individual companies, to provide insights into companies' quality of management, to assess the suitability of companies for inclusion in screened (ethical) funds, and to identify potential investment opportunities in the food sector.
- It is used by investors in their company engagement, both to prioritise companies for engagement (e.g. to identify leaders and laggards) and to define their expectations of companies (e.g. expectations that companies will achieve a specific Tier ranking within a particular period of time).
- It is now seen as the most authoritative global benchmark for the assessment of corporate farm animal welfare practice. Companies use their performance in the Benchmark as tangible evidence of their commitment to farm animal welfare; in fact, 26 of the 150 companies covered by the 2020 Benchmark have reported on their performance in the Benchmark in their corporate communications (e.g. on their websites, in their annual reports and sustainability reports, in media releases).

Box 3.1

The Importance of Impact to Investors

Since the first BBFAW in 2012, the investor perception of farm animal welfare has changed dramatically, from perception as a niche investment issue, to one where there is now widespread awareness of the importance of assessing and managing the investment risks and opportunities related to farm animal welfare.

Through engagement with companies on their approach to farm animal welfare, investors are increasingly looking for evidence that the management processes companies are putting in place are leading to impact on farm animal welfare in supply chains. Such evidence enables investors to assess the effectiveness of the management processes companies have implemented, and therefore the resulting risk and opportunity associated with the company's approach.

Disconnects between a company's ability to disclose their management processes and their subsequent impact on farm animal welfare in supply chains, such as those we have found in the BBFAW 2021 data, raise important questions about the effectiveness of company approaches to managing the supply chain risks associated with farm animal welfare.

How Does BBFAW Aim to Accelerate Impact?

Improving the welfare of all animals farmed for food is a collective responsibility; a responsibility that clearly extends to food companies and to their investors. This is why the work of the Business Benchmark on Farm Animal Welfare and the efforts of the investors that have signed the Global Investor Statement of Farm Animal Welfare and that participate in BBFAW's International Investor Collaboration on Farm Animal Welfare is crucial. Investors have played a critical role in making sure that farm animal welfare is on the agenda of food companies, in ensuring that companies have effective systems and processes in place to manage the business risks and opportunities presented by farm animal welfare, and in encouraging these companies to improve the welfare of animals across their entire supply chains.

Over the ten iterations of the Benchmark, the Secretariat has proactively engaged with the investment community, encouraging investors to use their influence to urge companies to take effective action on farm animal welfare. We have established the first ever Global Investor Statement on Farm Animal Welfare and the BBFAW Global Investor Collaboration on Farm Animal Welfare; both of these are now supported by over 30 institutional investors with over £2.3 trillion in assets under management. Furthermore, the results of our ongoing engagements with investors suggest that – as a result of the annual Benchmark itself and the BBFAW partners' and the Secretariat's extensive dialogue and capacity-building efforts – investors are increasingly likely to engage with companies to encourage them to better manage the issue of farm animal welfare. This engagement is widely cited by companies – particularly in their responses to the annual letters sent by investors to CEOs – as a key driver for them to take action on farm animal welfare.

In 2021, investors in the BBFAW Investor Collaboration wrote to the CEOs of all companies covered by the BBFAW to commend leading and improving companies on their performance in the Benchmark and to challenge poorer performers to improve. In total, 49 of the 150 companies (33%) submitted formal responses to investors, which is lower than last year but within the range of previous years (46% in 2020, 25% in 2019 and 39% in 2018). In 2021, we saw an increase in Board level responses – 42% of responses (compared to 19% in 2020) were from Board directors. This indicates that for an increasing proportion of companies, animal welfare has become a strategic issue.

A key focus of the BBFAW in the years ahead will be to support investor engagement with companies on driving impact disclosure. Impact reporting forms a critical part in enabling investors to assess the effectiveness of company approaches to managing the farm animal welfare risks in their supply chains.

Box 3.2

BBFAW NORDIC
Business Benchmark on Farm Animal Welfare

The findings of the first regional benchmark, BBFAW Nordic, were published in June 2021. Using the same methodology as the global Benchmark, the first chapter of the Nordic Benchmark assessed 26 leading Food Retailers and Wholesalers, Food Producers and Restaurants and Bars in Norway between 1 December 2020 and 31 January 2021. The findings revealed an overall average score of 32%, with 24 companies (92%) acknowledging farm animal welfare as a business issue, and 16 companies (62%) publishing a farm animal welfare policy. This compares to an average score of 26% in the inaugural Global Benchmark in 2012, where 71% of companies acknowledged farm animal welfare as an important business issue and 46% of companies had published a farm animal welfare policy. The relatively positive findings from the inaugural BBFAW Norway Benchmark can be partially explained by the requirement for mandatory reporting on farm animal welfare within the Norwegian meat and egg industry. Notwithstanding this fact, the 2021 findings indicate that Norwegian companies have a solid base on which to progress their farm animal welfare performance. However, there remains minimal detail provided by Norwegian companies on their internal and supply chain governance and management approaches and limited or no performance disclosure.

Many Norwegian food companies have indicated that the BBFAW provides a useful framework for structuring their farm animal welfare management and reporting. The annual assessment cycle – which is scheduled again for 2022 during March and April – is accompanied by an active programme of company engagement.

For further details, see **https://bbfaw-nordic.com/**

4. The 2021 Benchmark Methodology

This section provides an overview of the BBFAW, including a description of the programme, the structure of the Benchmark, the assessment approach and assessment criteria and the companies covered by the Benchmark. It also describes the questions and scoring in the 2021 Benchmark.

The list of companies covered by the 2021 Benchmark and the BBFAW Glossary can be found here: **https://bbfaw.com/publications/**

The structure of the Benchmark

This section 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 2020 Benchmark.[6]

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 provide:[7]

- 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, and their impact, 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.

Benchmark structure

The Benchmark has been designed to align with the reporting expectations above. The Benchmark 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, providing effective environmental enrichment, long distance live transportation).
- **Governance and Management** – board and senior management oversight of farm animal welfare strategy, targets and objective setting, internal controls, the adoption of assurance standards, and reporting on progress against policy commitments and against objectives and targets.
- **Leadership and Innovation** – investment in projects to advance farm animal welfare and advocacy on farm animal welfare.
- **Performance Reporting and Impact** – reporting on the company's performance against key animal welfare policies, targets and welfare outcome-based measures (e.g. species-specific indicators of animal well-being) together with a discussion on the progress being made by the company

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

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, stakeholder/consumer expectations, pricing, risk management, reputation management, market opportunities, and business development.

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 clear statement of the reasons why farm animal welfare is important to the business.
- A clear position on its expected standards of farm animal welfare.
- 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.
- 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 or sells, or not.

As relevant to their activities and operations, 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 provision of effective species-specific environmental enrichment, 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.

Governance and Policy Implementation
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.

Companies should:

- 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.
- Specify the measures they are using to assess performance against these objectives and targets.
- 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.
- Report on their performance against the objectives and targets they have set for themselves.

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

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

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

- 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.
- How supplier performance on farm animal welfare is promoted.
- How employee and supplier competencies to effectively manage farm animal welfare are developed and maintained (e.g. training).

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

Leadership and Innovation
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.

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

Performance Reporting and Impact
Companies should report on their performance on farm animal welfare.[8] Within this, they should report on commonly accepted welfare issues and the proportion of animals affected by their policies (e.g. on close confinement, on environmental enrichment, on routine mutilations such as tail docking, on pre-slaughter stunning, on ineffective stunning (i.e. back-up or repeat stunning), on maximum achieved journey times) as well as on species-specific welfare outcome measures (e.g. gait score and footpad dermatitis in broiler chickens, tail-biting and lameness in pigs, bone breakage and feather coverage in laying hens, or those related to mental wellbeing and expression of natural behaviour).

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

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

- The proportion of defined species (e.g. laying hens, sows, dairy cattle, broiler chickens) free from close confinement.
- The proportion of defined species (e.g. laying hens, pigs, dairy cows) free from routine mutilations.
- The proportion of broiler chickens of a slower-growing breed with higher welfare potential.
- The proportion of animals subject to pre-slaughter stunning.
- The proportion of animals transported within specified maximum journey times.

Weightings

The Benchmark criteria (see page 44) cover four core areas as indicated in Table 4.1, with points allocated to each area. In total, the Benchmark comprises 37 questions.

Table 4.1 Benchmark Elements

Pillar	% weighting in 2021 (2020 weightings)
1. Management Commitment	22 (26)
2. Governance and Management	24 (28)
3. Innovation and Leadership	9 (11)
4. Performance Reporting and Impact	45 (35)

Changes from the 2020 Benchmark Structure

The overall structure of the Benchmark remained the same in 2021. However, the weighting of the Performance Reporting and Impact section increased to 45% in 2021. The proportion of the scores allocated to Performance Reporting (Q20-27) in this section remained at 40% and the proportion of the scores allocated to Performance Impact (Q28-37) remained at 60%. Across the Benchmark as a whole, the 10 Performance Impact questions (Q28-37) accounted for 27% of a company's potential maximum score.

The Impact Ratings that were introduced in the 2020 BBFAW assessment, based on the scores achieved across the 10 Performance Impact questions, were only reported in aggregate in the 2020 Benchmark report with the individual Impact Ratings being shared with companies on a confidential basis. However, as planned, companies' individual Impact Ratings are published for the first time in the 2021 report (see main report, Figure 1.1).

Changes were made to the assessment of the Performance Impact questions. Alongside the increase in weighting for the 10 Performance Impact questions (Q28-37), the scoring approach for these questions was modified in two ways. Firstly the scoring classification was revised, as follows (and see Table 4.2 for an illustration):

- Changing the maximum number of points per question from 5 points to 10 points.
- Changing the percentage boundaries for the points awarded and increasing the number of points options, to align the scoring with the reported percentages.
- Changing the percentage bracket for full points from 100% to 99-100%, to allow an amount of leeway at the upper end of performance, acknowledging the practical challenges associated with reporting 100% achievement against stated criteria.

Table 4.2. The revised scoring for all 10 Performance Impact questions (Q28-37), with laying hens as an example

Percentage reported	Points
0% [of laying hens is cage-free, etc.], or no reported information	0
1% – 20% [of laying hens is cage-free, etc.]	1
21 – 40% [of laying hens is cage-free, etc.]	3
41 – 60% [of laying hens is cage-free, etc.]	5
61 – 80% [of laying hens is cage-free, etc.]	7
81 – 98% [of laying hens is cage-free, etc.]	9
99 – 100% [of laying hens is cage-free, etc.]	10

The second change was to increase the points available for partial impact reporting, where the reporting was substantial in scope. This was intended to both encourage those companies yet to start reporting impact and to better reward companies already doing so for substantial parts of their supply chains.

In previous Benchmarks, companies that did not report progress in line with the requirements of the Performance Impact questions (reporting data reflecting the company's impact on the issue in question across all relevant geographies and all relevant products across their global supply chain) were awarded 0.5 points out of 5 points (equivalent to 1 out of 10 points). Many companies failed to provide sufficient detail in their reported performance data to make it possible to accurately determine the proportion of animals in their global supply chain that was impacted. BBFAW refers to such reporting as 'partial impact reporting'.

In 2021, the points awarded for partial impact reporting which was 'substantial' in scope was increased from the equivalent of 1 point to 3 points out of 10, with the condition that the description of the scope of the reported data was clear. A substantial scope included reporting on an entire species, or geography, subsidiary or form of livestock product which covers a significant percentage of the company's business or volumes. Examples of partial but substantial reporting are provided in 'The 2021 Assessment Criteria' section of this report.

An insubstantial scope included reporting for specific product lines or reporting data with an unclear scope. Such partial impact reporting was awarded 1 point out of 10, as per previous Benchmarks.

The Assessment Approach

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 group entity manages farm animal welfare issues. The Benchmark did however give credit for the actions (e.g. innovative practices and processes) of subsidiaries or for actions in specific geographic regions.

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 September 2021). 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 questions.[9] We conducted similar reviews of the websites of company subsidiaries and brands, and, where relevant, postings on social media (but only if signposted from company's corporate websites).

We did not give credit for information in the public domain that was not provided by the company. Examples of such reporting might include a press release citing a company's involvement in a farm animal welfare industry initiative, or an award conferred on a company by an independent organisation. Such absence of reporting raises questions about the level of attention being paid to farm animal welfare more generally by the company in question.

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 BBFAW Partner organisations are advantaged by the assessment methodology.

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.

Quality assurance and company reviews

The BBFAW ensures consistency and fairness in the assessment process thorough quality control. This process was overseen by Nicky Amos (Executive Director of the BBFAW) and the assessment team leader (Dr Heleen van de Weerd). It ensures the factual accuracy of the assessments, the correct and consistent application of the (updated) criteria and ensures that biases were not being introduced into the assessments.

The quality control process included the following aspects:

- Annual training of all assessors on the BBFAW methodology and research process and on annual changes in its methodology.
- Training of new assessors involved completion of two company assessments and individual review of results.
- All initial company assessments were reviewed by an experienced member of the assessment team and any inconsistencies were corrected.
- BBFAW Secretariat checks were carried out to ensure updated criteria were applied across all company assessments. They also ensured that assessments were not penalising or favouring specific business models (for example, complex versus simple supply chains, principal business operations within Europe versus operations mainly outside of Europe, and multiple brands versus fewer brands).
- Initial company assessments were reviewed by members of the BBFAW Partner organisations to further check the factual accuracy and to ensure consistency of the assessment methodology.

Companies were granted access to their preliminary company reports with interim findings and scores in December 2021. Forty-eight of the 150 companies responded with written comments or requested further dialogue on the assessment approach and scoring. As a result of these discussions, we raised the scores for 38 companies, with seven of these resulting in an increase in Tier.

Company scores were revised only in situations where there had been misinterpretations or 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 January 2021.

The 2021 Assessment Criteria

The 2021 assessment criteria are presented on page 44. Each question was supported by a rationale, the scoring framework and explanatory notes on how the assessment was conducted.

Notes on the scoring framework:

- A number of the questions were binary (i.e. yes/no) in nature. Examples include Question 1 and the two parts of Question 15. In these questions, companies scored either full marks or zero for the question.
- Certain questions affected the scoring of subsequent questions. For example, Question 2 was scored only if points had been awarded for Question 1, and Question 3 was scored only if points had been awarded for Question 2.
- For the majority of questions, the scoring was granular, allowing for criteria that are partially met to be acknowledged (for example, where evidence is limited to a particular geography, species or product).
- Questions 28 to 35 were species-specific, and we only asked and incorporated into scores if the species were relevant to the company.

Changes from the 2020 Benchmark

Several changes were made to update or clarify the criteria for the 2021 Benchmark.

Based on a review of the BBFAW assessment criteria in 2020, the BBFAW is intended to remove the potential for double scoring within the assessment. Double scoring can occur in cases where the same evidence provides the basis for points being awarded in more than one question. This applied to the questions in the Governance and Management section (Question 14) and the Performance Reporting and Impact section (Q20 to Q37).

In the 2021 Benchmark, the first step towards removing the potential for double scoring was taken by changing:

- Question 14: to focus on the explanation of progress against objectives and targets, which may be qualitative or quantitative (no change in maximum points available).
- Question 27: to focus on the explanation of progress in performance for welfare outcome measures (and a change in the maximum points available from 10 to 5 points).

By placing the emphasis on the explanation of progress (rather than reporting per se), we sought evidence that companies were monitoring progress and were actively using these insights to inform or adapt their management approach to deliver on their objectives and targets.[10]

Further changes to questions were as follows:

Management Commitment and Policy

[Clarification] Q4, on the avoidance of close confinement:

The rationale for this question was modified by adding more examples of intensive housing systems: cages (battery and enriched/colony) for laying hens, rabbits, other poultry; gestation/sow stalls and farrowing crates for sows) and high stocking densities for pigs and poultry.

[Clarification] Q5, on the provision of effective species-specific environmental enrichment:

It was explained that chains for pigs and enriched/furnished cages for laying hens were not classed as effective enrichment.

[Clarification] Q8, on the avoidance of antibiotics:

It was explained that in the absence of a clear position on the reduction or avoidance of antibiotics for prophylactic use, companies that marketed a particular product line as antibiotic-free, or focused solely on critically important antibiotics, were not awarded any points.

Clarifications to Questions 5 to 11:

It was explained that companies that made a commitment on a specific welfare issue for a specific product or limited product range were awarded a score of 1 point, in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded.

Governance and Management

[Clarification] Q13, on setting objectives and targets:

It was explained that objectives and targets could also be linked to welfare outcome measures but that the reporting on progress against these was assessed in Question 26 and Question 27.

[Change] Q14 (see also above), on the explanation of progress against objectives and targets:

The revised question assessed whether the company provided an explanation of progress against at least one objective or target, awarded with 3 points; or against multiple objectives and targets, awarded with 5 points. If no explanations were provided, no points were awarded.

Innovation and Leadership

No changes.

Performance Reporting and Impact

[Clarification] Q20, reporting on close confinement and Q29, reporting the proportion of sows free from sow stalls:

It was explained that statements on the proportion of sows that are free from stalls (after the insemination period) needed to be transparent and clearly indicate how much time sows in the sow stall-free supply spend in sow stalls. For example, this could be 'zero days' or 'the first 4 weeks of pregnancy' (in line with BBFAW criteria), in order to receive points.

[Change] Q27 (see also above), on the explanation of progress in performance for welfare outcome measures:

The revised question assessed whether the company provided an explanation of progress against at least one welfare outcome measure, but limited to certain geographies, species, or products, awarded with 3 points; or an explanation for at least one welfare outcome measure for each relevant species across all geographies and products, awarded with 5 points. If no explanations were provided, no points were awarded.

Clarifications to Questions 28 to 37, partial, substantial impact reporting:

It was explained that depending on whether the scope of the partial reporting was substantial or not, companies were either awarded the equivalent of 1 or 3 points.

Examples of partial but substantial reporting are provided below:

- "In Europe, Australia, and New Zealand, 100% of the eggs we purchase are either free-range or cage-free [...] In North America, 27% of the eggs we purchase are cage-free. In Latin America, 31% of the processed eggs we purchase are cage-free."
- "All Own Brand shell eggs sold nationally are cage-free [...] 36% of all Own Brand products with egg are cage-free."
- "100% of UK sows are loose housed throughout their gestation and free from sow stall confinement."

Clarifications to the criteria

In this section we highlight aspects of the 2021 criteria to clarify how scoring decisions were made with a view to align assessments across assessors and to enhance transparency.

Comprehensive animal welfare policies
Most companies deal with one or more animal species within their supply chain. Alongside a few primary species, companies will also manufacture and/or sell certain processed products, which may include ingredients originating from other animal species (e.g. eggs, dairy or fish).

The BBFAW methodology requires companies to assume responsibility for both the main, as well as these additional species. This responsibility also applies to animals that have reached the end of their productive lives in the supply chain, such as end-of-lay hens, dairy cows and sows. Thus, all animal species in a supply chain should be covered in the animal welfare policy/commitments in order to receive full points.

The scope of the animal welfare policy (Q3)
There continued to be variation among companies regarding how clearly the scope of the animal welfare policy or position statement was explained. This also applied to companies that operate in one geography but who did not state clearly whether their policy scope was restricted to this geography only, or whether they sourced animal-based products from outside their main geographic base.

Overall, it needs to be made very clear which geographies, animal species and products were included in the animal welfare policy commitment(s) if companies are to be awarded full points for this question. In cases where companies had been asked to clarify the scope, but subsequently failed to provide clarification, the points previously awarded were reduced.

Clearly stated intent of commitments (Q4 to Q11)
Companies continue to 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 made high-level statements on specific issues (e.g. on the avoidance of long-distance transport or requiring the provision of environmental enrichment) but these statements did not specify what this meant in practice (e.g. live transportation not specified in the context of maximum journey times or not stating the specific enrichment that needed to be provided to various species), which made it difficult to assess whether such statements would lead to performance on their stated intent (and ultimately impacting on the lives of animals).

Conversely, several companies reported on animal welfare practices (e.g. on live transport times, cage-free eggs and types of enrichment provision) without the company clearly stating an overarching company policy or position on these practices.

To reiterate, in order to receive points the Benchmark is looking for explicit statements, specific commitments and clear explanations about the management of farm animal welfare.

Clarification on promoting higher farm animal welfare to consumers (Q19)
Companies sometimes suggested that webpages showing how products for a certain brand are sourced or produced or listing its ingredients (e.g. mentioning that products are cage-free or contain cage-free eggs) should have been assessed as promoting higher animal welfare to consumers. However, such examples were not sufficient for awarding points, unless there was an explicit focus on explaining the welfare of farm animals.

Clarification on reporting on stunning (Q23, Q24, and Q37)
The BBFAW asks companies to report on the proportion of animals that is subjected to back-up or repeat stunning (Q24). Several companies reported on the proportion of animals that were effectively stunned. However, for this question the reporting needed to be specifically on the proportion of animals that was subjected to back-up or repeat stunning, as reporting on the effectiveness of stunning per se does not necessarily guarantee the use of back up stunning (and the checks that lead to the use these methods). Q23 and Q36 assessed reporting on the proportion of animals that was pre-slaughter stunned.

APPENDIX
Company Coverage

Benchmark scope

In total, 150 of the world's largest food companies were included in the 2020 Benchmark. These companies were broadly spread across the three food industry subsectors (see Table 4.3). The universe of companies is global although it continues to be weighted towards North American and European companies (see Table 4.4).

Table 4.3: Companies by sub-sector

Sub-sector (ICB Classification)	Number of Companies
Food Retailers & Wholesalers (5337)	54
Food Producers (3570)	63
Restaurants & Bars (5757)	33
Total	**150**

Table 4.4: Companies by country of listing or incorporation

Country of Listing or Incorporation	Number of Companies
USA	44[11]
UK	20
France	13
China	9
Germany	9
Italy	8
Brazil	6
Canada	6
Netherlands	5
Japan	5
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
Taiwan	1
Luxembourg	1

Changes in the companies covered by the 2021 Benchmark

We assessed one company under its new parent company, which was already included in the Benchmark scope, and assessed one other company under its new parent company, which was not previously included in the Benchmark scope. These changes reflect the completion of recent company acquisitions. The changes are summarised in Table 4.5.

The number of companies in the 2021 Benchmark remained at 150.

Table 4.5: Updates to the 2021 company list

Retailers and Wholesalers	Food Producers	Restaurants and Bars
Asda Stores Ltd will be assessed under its new parent company, **EG Group**, following its acquisition by EG Group from Walmart Inc		**Dunkin' Brands Inc** will be assessed as part of its new parent company, Inspire Brands

The 2021 Benchmark covered:

- 91 public companies.
- 40 private companies.
- 15 cooperatives.
- 4 joint stock/partnership owned companies.

The 2021 Benchmark Questions and Scoring

Management Commitment and Policy	
Question 1. Does the company acknowledge farm animal welfare as a business issue?	
Acknowledging farm animal welfare as a business issue is an important first step towards implementing a comprehensive approach to farm animal welfare management. It is good practice for food companies to identify whether and why farm animal welfare is a relevant issue for the business.	
No evidence that farm animal welfare is regarded as a relevant business issue.	0
The company identifies farm animal welfare 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.

Question 2. 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 firmly on the business agenda.	
No evidence of a formal policy statement (or equivalent) on farm animal welfare.	0
The company has a broad commitment to farm animal welfare in a policy statement (or equivalent) but no description of how the policy is to be implemented.	5
The company has a broad commitment to farm animal welfare within a policy statement (or equivalent) and a description of the processes in place to ensure that the policy is effectively implemented.	10
	(Max Score 10)

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 considered when deciding whether to award points for Questions 1 and 4-11.
- 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 and points were therefore not awarded. These policies were considered when deciding whether to award points for Questions 1 and 4-11.
- 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 regarding 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 if the policy was not being effectively implemented)
  - A commitment to continuous improvement and public reporting on performance.

Question 3. 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.	
3a. Geographic scope	
Geographic scope is not specified.	0
Scope is limited to certain specified geographies.	2
Scope is universal across all geographies.	5
3b. Species scope	
Species scope is not specified.	0
Scope is limited to certain specified species.	2
Scope is universal across all relevant species.	5
3c. Product scope	
Product scope is not specified.	0
Scope is limited to certain specified products (such as own-brand products).	2
Scope is universal across own brand 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.
- To qualify for partial points on product scope, policies needed to apply to a significant proportion of a company's supply chain, such as a substantial business division (e.g. a restaurant brand or manufacturing division) or own-brand products (in the case of retailers and wholesalers). Policies which apply to limited product ranges are not awarded points.
- In some cases, companies used terms such as 'all animals' or 'all products'. We asked companies to clarify whether this meant that the policy had universal application (with respect to animals and products) in order to receive points in future assessments.
- 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 (unless the company stated otherwise, or had a separate policy that applied to finfish. If it was unclear whether finfish were included, partial 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.

Question 4. Does the company have a clear position on the avoidance of close confinement and intensive systems for livestock (e.g. cages (battery and enriched/colony) for laying hens, rabbits, other poultry; gestation/sow stalls and farrowing crates for sows; concentrated animal feeding operations (CAFOs or feedlots), permanent housing for dairy cows, single penning, tethering, veal crates; force feeding systems; high stocking densities for poultry, and, for finfish, high stocking densities and close confinement of solitary finfish species, e.g. turbot)?	
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 or 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 or products) is clearly defined.	3
The company makes a universal commitment to avoid confinement across all relevant species, own-brand and other brand products and geographies.	5
	(Max Score 5)

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, or products) were awarded a score of 1 point.
- Companies that made a commitment to the avoidance of close confinement for a specific product or limited product range (e.g. using only free-range eggs) and were clear about the scope, were awarded 3 points, even if the scope did not include all geographies or all brands.
- 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 awarded a score of 3 or 5 points depending on the scope of their commitment. For companies that did not clearly state how long this confinement period was, we asked them to clarify their position to continue to receive points in future assessments.

Question 5. Does the company have a clear position on the provision of effective species-specific environmental enrichment?	
Companies are expected to provide animals with stimulating and complex environments that enable species-specific behaviours. Effective environmental modifications allow for the performance of strongly motivated species-specific behaviours and lead to the expression of a more complex behavioural repertoire. Examples include (but are not limited to) brushes for cattle; manipulable materials such as straw for pigs; pecking and dustbathing substrates, and perches for chickens; bathing water for ducks; outdoor range enhancement, such as artificial or natural shelter; (artificial) plants, floor substrates and structures for fish. Animals with outdoor access should also be provided enrichment (outdoors or indoors).	
No stated position.	0
The company makes a partial commitment to providing effective species-specific enriched environments but the scope (in terms of geography, species or products) is not clearly defined.	1
The company makes a partial commitment to providing effective species-specific enriched environments and the scope (in terms of geography, species or products) is clearly defined.	3
The company makes a universal commitment to providing effective species-specific enriched environments across all relevant geographies, species, and products.	5
	(Max Score 5)

Explanatory Notes:
- This question was looking for a clear position on the provision of effective species-specific environmental enrichment.
- The term environmental enrichment is often used to describe modifications to a captive environment to enhance the performance of strongly motivated species-specific behaviours or encourage the expression of natural behaviours.
- Chains for pigs and enriched/furnished cages for laying hens were not classed as effective enrichment.
- We did not award companies points for providing outdoor access under this question as this is assessed under the question on the avoidance of close confinement. Animals provided with outdoor access should still be provided with environmental enrichment.
- Chains for pigs and enriched/furnished cages for laying hens were not classed as effective enrichment.
- Simply stating compliance with legislation was not treated as a proxy for having a clear position on the provision of species-specific enrichment. 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 comply with legislation but did not have a formal policy were, therefore, awarded zero points.
- Similarly, simply stating compliance with a farm assurance standard that specifies environmental enrichment was not treated as a proxy for having a clearly stated position, unless the commitment to provide environmental enrichment was made explicit (e.g. compliance with the standard is presented as a way of delivering on its commitment to the provision of species-specific enrichment).
- Companies that made a commitment to the provision of species-specific environmental enrichment but were not clear about the scope (in terms of geography, species or products) were awarded a score of 1 point.
- Companies that made a commitment to the provision of species-specific environmental enrichment for a specific product or limited product range were awarded a score of 1 point (in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded).
- Companies that made a commitment to the provision of species-specific environmental enrichment for a minor product or limited product range were awarded a score of 1 point (in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded).
- Companies that simply mentioned they provided enrichment, but without context or a description of the enrichment (or for which species) received a score of 1 point and a comment that in order to keep receiving such points they would need to clarify their statements further.

Question 6. Does the company have a clear position on the avoidance of products from farm animals subject to genetic engineering and cloning and/or their progeny or descendants throughout its products?	
Both cloning and genetic engineering raise serious animal welfare concerns . In farmed fish species this includes heat treatment of eggs to induce triploidy, which renders fish sterile.	
No stated position.	0
The company has made a partial commitment to the avoidance of animals subject to genetic engineering and cloning but the scope (in terms of geography, species or products) is not clearly defined.	1
The company has made a partial commitment to the avoidance of animals subject to genetic engineering and cloning and the scope (in terms of geography, species or products) is clearly defined.	3
The company makes a universal commitment to avoidance of animals subject to genetic engineering and 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 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 and 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 and cloned animals).
- Companies that made a commitment to the avoidance of products from farm animals subject to genetic engineering or cloning and their progeny or descendants but were not clear about the scope (in terms of geography, species or products) were awarded a score of 1 point.
- Companies that made a commitment to the avoidance of products from farm animals subject to genetic engineering and cloning for a specific product or limited product range were awarded a score of 1 point (in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded).
- Companies that made a commitment to the avoidance of products from farm animals subject to genetic engineering and cloning for a minor product or limited product range were awarded a score of 1 point (in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded).
- Companies that only referred to a specific genetic engineering technique (e.g. somatic cell nuclear transfer cloning), only received 1 or 3 points depending on the scope of their commitment.
- 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 and 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.

Question 7. 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. Essential oils and organic acids are not classed as growth promoters for the purpose of this question, although they are often used to support gut health (in pigs and poultry) in the absence of antibiotic growth promotors.	
No stated position.	0
The company has made a partial commitment to the avoidance of growth promoting substances, but the scope (in terms of geography, species or products) is not clearly defined.	1
The company has made a partial commitment to the avoidance of growth promoting substances, but the scope (in terms of geography, species or products) is clearly defined.	3
The company makes a 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 (but they could be awarded points for such a statement in the question on the reduction or avoidance of antibiotics for prophylactic use).
- Companies with a stated target to reduce the level of growth promoting substances (rather than avoidance) were not awarded points for this question.
- Companies that stated compliance with legislation or guidance on eliminating (human) medically important antibiotics used as growth promotors, 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).
- Companies that made a commitment to the avoidance of growth promoting substances for a minor product or limited product range were awarded a score of 1 point (in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded).

Question 8. Does the company have a clear position on the reduction or avoidance of antibiotics for prophylactic use?	
The over-use of antibiotics in humans and in animals is directly linked to the increase in antibiotic resistance. The use of antibiotics on-farm (typically through feed or water) is frequently prophylactic; effectively 'propping up' intensive farming systems where animals are kept in confined and stressful conditions and where their immune systems are compromised and disease outbreaks can spread rapidly. Companies are expected to commit to reducing the levels of antibiotics they administer routinely and to develop animal production systems that are not reliant on the routine use of antibiotics for disease prevention.	
No stated position.	0
The company has made a partial commitment to the reduction or avoidance of the routine use of antibiotics, but the scope (in terms of geography, species or products) is not clearly defined.	1
The company has made a partial commitment to the reduction or avoidance of the routine use of antibiotics, and the scope (in terms of geography, species or products) is clearly defined.	3
The company makes a universal commitment to the reduction or avoidance of the routine use of antibiotics across all geographies, species and products.	5
	(Max Score 5)

Explanatory Notes:

- We defined antibiotics as medicines used to control infectious (bacterial) diseases in humans and animals.
- There are four broad categories of on-farm use of antibiotics, namely: therapeutic (i.e. giving a treatment when clinical disease is identified), metaphylactic (i.e. giving treatment to a group of animals when some are showing signs of illness), prophylactic (i.e. giving a treatment to an animal or group of animals in anticipation of a disease or when there is a risk of infection), and growth promotion (i.e. giving antibiotics to improve the growth rates of animals). This question was looking for a clear position on the reduction or avoidance of antibiotics for prophylactic use.
- 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).
- In the absence of a clear position on the reduction or avoidance of antibiotics for prophylactic use, companies that marketed a particular product line as antibiotic-free, or focused solely on critically important antibiotics, were not awarded any points. The rationale for this was because a) this question was looking for a clear commitment from the company to the reduction or avoidance of antibiotics for prophylactic use, b) the question applied to all antibiotics (i.e. not just antibiotics that are critical to human health).
- Companies that made a commitment to the reduction or avoidance of the routine use of antibiotics for a minor product or limited product range were awarded a score of 1 point (in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded).

Question 9. 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 or tipping, 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/tipping, castration of beef cattle with knives, branding with hot irons, dehorning of dairy cattle with hot irons, castration and tail docking of pigs, sheep and calves (surgical, rubber rings or clamping), and fin clipping in finfish aquaculture.	
No stated position.	0
The company has made a partial commitment to the avoidance of routine mutilations but the scope (in terms of geography, species or products) is not clearly defined.	1
The company has made a partial commitment to the avoidance of routine mutilations and the scope (in terms of geography, species or products) is clearly defined.	3
The company makes a universal commitment to the avoidance of routine mutilations across all relevant species, own-brand and other branded products and geographies.	5
	(Max Score 5)

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 or products) were awarded a score of 1 point.
- Companies that made a commitment to the avoidance of routine mutilations for a minor product or limited product range were awarded a score of 1 point (in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded).
- 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 points, but only if this was clarified by a commitment to the avoidance of surgical castration with a clear scope for this commitment.

Question 10. 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 or products) is clearly defined.	3
The company makes a universal commitment to avoid the use of meat from animals that have not been subjected to pre-slaughter stunning or from finfish that have not been rendered insensible across all species, own-brand and other branded products and geographies.	5
	(Max Score 5)

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 or products) were awarded a score of 1 point.
- Companies that made a commitment to pre-slaughter stunning for a minor product or limited product range were awarded a score of 1 point (in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded).
- 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.

Question 11. 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, and less than 8 hours. 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 or products) is clearly defined.	3
The company makes a 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 kilometres, 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 or products) were awarded a score of 1 point.
- Companies that made a commitment to the avoidance of long-distance live transportation for a minor product or limited product range were awarded a score of 1 point (in contrast to a clear scope such as a policy for all own-brand products, for which 3 points were awarded).

Governance and Management	
Question 12. 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.	
12a. Management responsibility	
No clearly defined management responsibility.	0
The company has published details of the management position with responsibility for farm animal welfare on a day-to-day basis.	5
12b. Board or senior management responsibility	
No clearly defined board or senior management responsibility	0
The company has published details of how the board or senior management oversees the implementation of the company's farm animal welfare policy.	5
	(Max Score 10)

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 this included farm animal welfare.

Question 13. 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
The company has published objectives and targets but with no information on how these are to be achieved.	5
The company has 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 objectives and targets, and for evidence that the company had a clear plan for achieving these objectives and 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 objectives and targets relating to 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).
- Objectives and targets can also be linked to welfare outcome measures but the reporting on progress against these was assessed in Question 26 and Question 27.
- Companies with multiple objectives and targets, but without further, or very limited, information on how these were to be achieved, were awarded 5 points.
- Companies were awarded maximum points if they provided information on how objectives and targets were to be achieved, e.g. by specifying the main actions to be taken, by indicating the time frame, by indicating the financial and other resources required.

Question 14. Does the company provide an explanation of progress against its animal welfare objectives and targets?	
Companies should provide an explanation of progress against their objectives and targets	
The company does not provide an explanation of progress against its objectives and targets.	0
The company provides an explanation of progress against at least one objective or target.	3
The company provides an explanation of progress on how it has performed against its multiple objectives and targets.	5
	(Max Score 5)

Explanatory Notes:

- The purpose of this question was to encourage companies to continuously report on progress against their objectives and targets, and to provide a narrative on current challenges and opportunities that aid or hinder achievement of these objectives and targets.
- For the purposes of scoring, we did not differentiate between explanations of progress on objectives and targets relating to 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).
- 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.
- We expected companies to continue to comment on reporting when specific targets or objectives have been reached (e.g. are at 100%) to ensure that their performance is maintained at 100% and that this performance was continually monitored (e.g. a company could report that they only use 100% cage free eggs, but we still expected year-on-year explanations that the performance remains at 100%).
- Explanations of progress on objectives and targets related to Welfare Outcome Measures were not considered for this question, instead they may have been awarded points under Question 27.

Question 15. 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.	
15a. Employee training	
No information provided on employee training in farm animal welfare.	0
The company provides specific training to employees in farm animal welfare.	5
15b. Actions taken in the event of non-compliance	
The company provides no information on the actions to be taken in the event of non-compliance with the farm animal welfare policy.	0
The company describes the actions it takes in the event of non-compliance with its farm animal welfare policy.	5
	(Max Score 10)

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-question).
- 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. Descriptions of internal controls in relation to CSR or product quality-related policies were not awarded points for this sub-question unless it was clear that these policies and processes also covered farm animal welfare.

Question 16. 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
16a. Does the company describe how it implements its farm animal welfare policy (or equivalent) through its supply chain via supplier contracts?	
No information on how farm animal welfare is included in supplier contracts.	0
The company incorporates farm animal welfare into contractual obligations for suppliers, but this is limited by geography and/or certain products or species	3
The company incorporates farm animal welfare into contractual obligations for suppliers across all species, products and geographies.	5
16b. Does the company describe how it implements its farm animal welfare policy (or equivalent) through its supply chain via monitoring and auditing?	
No information provided on how supplier compliance with contract conditions is monitored.	0
The company specifies farm animal welfare as part of supplier auditing programme.	5
16c. Does the company describe how it implements its farm animal welfare policy (or equivalent) through its supply chain via education and support?	
No information provided on the specific support and/or education provided to suppliers.	0
The company provides specific support and/or education provided to suppliers on farm animal welfare policy/issues.	5
	(Max Score 15)

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 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.

Question 17. 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. For retailers and wholesalers, this question applies to all own-brand products.	
No assurance standard specified.	0
A proportion of products audited to basic farm assurance (or equivalent company) standard.	3
A proportion of products audited to a combination of basic and higher farm assurance (or equivalent company) standard.	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:

- 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. Examples of standards which provide basic farm assurance (typically within a wider quality context) include: Assured British Meat Scheme; Aquaculture Standards Council (ASC); BEIC Lion Quality; Best Aquaculture Practice (BAP); BFC Certification de Conformité de Produits; Global Standards; FMI Animal Welfare Standards; GLOBALG.A.P.; North American Meat Institute; Red Tractor Farm Assurance Schemes; Viande de Porc Française.
- Farming systems that provide for behavioural freedom without compromising health can be described as having higher welfare potential. Whilst it is essential to set high standards to ensure livestock production systems have higher welfare potential, it is also important to monitor welfare outcomes (such as mortality, disease, lameness, injuries and the occurrence of normal and abnormal behaviours) to assess the overall performance of the system. In general, schemes with an animal welfare focus require system inputs that offer a higher welfare potential. However, they may also include more detailed welfare outcome measures and more frequent/detailed inspections than basic farm assurance standards. Examples of higher welfare schemes, which offer many welfare advantages relative to standard industry practice for all species include: Animal Welfare Approved; Better Animal Welfare (Denmark); Beter Leven; Certified Humane; European Organic Certification; Global Animal Partnership (GAP 5-Step); KRAV; Neuland; Soil Association Organic; RSPCA Assured; Label Rouge (Label Rouge pork is not systematically higher welfare, except if "fermier").
- Where companies report on performance by reference to their own internal standards, we need a clear description of how the company standard compares to the relevant basic or higher assurance standards outlined above in order for points to be awarded.
- Companies that report on performance by reference to the proportion of products audited but without specifying whether these are to basic or higher farm assurance standards are awarded 3 points.
- There are a number of voluntary schemes that 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 describe their performance against these sorts of standards generally do not receive points unless there is a clear description of the farm animal welfare elements of such standards.

Innovation	
Question 18. 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.	
18a. Involvement in research and development	
No evidence of company involvement in research and development programmes to improve farm animal welfare.	0
Evidence of current company involvement in research and development programmes to improve farm animal welfare.	5
18b. Involvement in industry or other initiatives	
No evidence of active company involvement in industry or other initiatives directed at improving farm animal welfare.	0
Evidence of active company involvement in industry or other initiatives (e.g. working groups, supporting NGO activities, 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-question).
- 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.
- Regarding research, points were only awarded for recent, updated information. If similar information appeared to be repeated year on year, a comment was added to prompt for an update to keep receiving points in future Benchmarks.

Question 19. 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 of activities 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).

Performance Reporting and Impact	
Question 20. Does the company report on the proportion of animals (or volume of fresh or frozen animal products and its ingredients) in its global supply chain that is free from close confinement (i.e. those in barn, free-range, indoor group housed, indoor free-farrowing, outdoor bred/reared)?	
In addition to having clear policy commitments and management practices, companies are expected to maintain strict reporting criteria for animals in their supply chain. This question is looking specifically at measures linked to the housing systems used for animals in their supply chains. This is because many of the most significant farm animal welfare concerns result from close confinement practices (such as barren battery cages, sow stalls, farrowing crates, veal crates, concentrated animal feeding operations (CAFOs or feedlots), permanent housing for dairy cows, tethered systems, close confinement of solitary finfish species, e.g. turbot). For retailers and wholesalers, this question applies to all own-brand products.	
No reporting on the proportion of animals free from close confinement	0
The company reports on the proportion of animals free from close confinement, but this reporting is limited to certain geographies, species or products.	3
The company reports fully on the proportion of animals free from close confinement, covering all relevant geographies, species and products.	5
	(Max Score 5)

Explanatory Notes:

- This question was looking specifically for explicit reporting on the proportion of animals that is 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 (e.g. with statements such as: 'xx% of our animals...').
- Companies that made statements on the proportion of sows that were free from stalls, (after the insemination period) needed to be transparent and clearly state how long this confinement period was, in order to receive 3 or 5 points.

Question 21. Does the company report on the proportion of animals in its global supply chain that is provided with effective species-specific enriched environments?	
In addition to having clear policy commitments and management practices, companies are expected to maintain strict reporting criteria for animals in their supply chain. Examples can include (but are not limited to) brushes for cattle; manipulable materials such as straw for pigs; pecking and dustbathing substrates, and perches for chickens; bathing water for ducks; outdoor range enhancement, such as artificial or natural shelter; (artificial) plants, floor substrates and structures for fish. For retailers and wholesalers, this question applies to all own-brand products.	
No reporting on the proportion of animals provided with effective species-specific enriched environments.	0
The company reports on the proportion of animals provided with effective species-specific enriched environments, but this reporting is limited to certain geographies, species or products.	3
The company reports fully on the proportions of animals provided with effective species-specific enriched environments across all relevant geographies, species and products.	5
	(Max Score 5)

Explanatory Notes:

- This question was specifically looking for explicit reporting on the proportion of animals that is provided with effective species-specific environmental enrichment.
- Chains for pigs and enriched/furnished cages for laying hens were not classed as effective enrichment.
- 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 provided with environmental enrichment.
- 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 provided with environmental enrichment were not awarded points unless they could demonstrate that these statements were supported by monitoring data (e.g. with statements such as: 'xx% of our animals…').
- Companies that just mentioned that they provided enrichment to a proportion of their animals, but without context or a description of the enrichment (or for which species) received partial points and a comment that to keep receiving such points they should clarify their statements further.

Question 22. Does the company report on the proportion of animals in its global supply chain that is free from routine mutilations (i.e. castration, teeth clipping, tail docking, toe clipping, dehorning, desnooding, de-winging, disbudding, mulesing, beak trimming/tipping, 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. For retailers and wholesalers, this question applies to all own-brand products.	
No reporting on the proportion of animals that is free from routine mutilations	0
The company reports on the proportion of animals that is free from routine mutilations, but this reporting is limited to certain geographies, species or products.	3
The company reports fully on the proportion of animals that is free from routine mutilations, covering all relevant geographies, species and products.	5
	(Max Score 5)

Explanatory Notes:

- This question was looking specifically for explicit reporting on the proportion of animals that is 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 (e.g. with statements such as: 'xx% of our animals…').
- 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.

Question 23. Does the company report on the proportion of animals (including finfish) 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. For retailers and wholesalers, this question applies to all own-brand products.	
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 products.	3
The company reports fully on the proportion of animals subject to pre-slaughter stunning, covering all relevant geographies, species and products.	5
	(Max Score 5)

Explanatory Notes:

- This question was looking specifically for explicit reporting on the proportion of animals that is 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 (e.g. with statements such as: 'xx% of our animals…').

Question 24. Does the company report on the proportion of animals (excluding finfish) in its global supply chain that is ineffectively stunned, i.e. is subject to back-up or repeat stunning?	
In addition to having clear policy commitments and management practices, companies are expected to maintain strict measurement criteria for animals in their supply chain. It is essential to render an animal unconscious before it is slaughtered in order for it to be insensible to pain, discomfort and stress, until death occurs. This question is looking specifically at monitoring the effectiveness of pre-slaughter stunning of animals (excluding finfish) in their supply chains as well as the attentiveness of operators to identify when a back-up stun or a repeat stun is required. For retailers and wholesalers, this question applies to all own-brand products.	
No reporting on the proportion of animals subject to back-up or repeat stunning.	0
The company reports on the proportion of animals subject to back-up or repeat stunning, but this reporting is limited to certain geographies, species or products.	3
The company reports fully on the proportion of animals subject to back-up or repeat stunning, covering all relevant geographies, species and products.	5
	(Max Score 5)

Explanatory Notes:

- This question was looking specifically for explicit reporting on the proportion of animals that were subjected to back-up or repeat stunning. Companies that reported on the effectiveness of stunning (x% of animals effectively stunned) were not awarded any points.
- 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 "None of our animals" or "No animals" required back-up or repeat stunning, were not awarded points unless they could demonstrate that these statements were supported by monitoring data (e.g. with statements such as: 'xx% of our animals…').

Question 25. 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. For retailers and wholesalers, this question applies to all own-brand products.	
No reporting on live transport times.	0
The company reports on the live transport times for animals, but this reporting is limited to certain geographies, species or products.	3
The company reports fully on the live transport times for animals, covering all relevant geographies, species and products.	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 (e.g. with statements such as: 'xx% of our animals…').
- 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.

Question 26. 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. There is an increasing focus on positive outcome measures (e.g. active and play behaviour). For retailers and wholesalers, this question applies to all own-brand products. WOMs might include for example: • For all species: mortality rates. • For laying hens: end of lay feather coverage, keel bone fractures, bone breakages at slaughter. • For dairy cows: lameness, mastitis, body condition, involuntary culling rate. • For pigs: lameness, tail bites and other lesions. • For broiler chickens: gait score, footpad dermatitis, hockburn, breast blisters. • For beef: body condition, lameness. • For rabbits: foot lesions, fur coverage, eye condition. • For fish: fin and body damage. • For mental wellbeing: reaction to humans or novelty, fear, comfort • For behaviour: time spent lying/resting, ruminating or being active – foraging, perching, dustbathing, socialising. • For transportation: injuries, slips and falls, fatigue, road traffic incidents, mortality (dead-on-arrival/DOA). • For slaughter: effectiveness of stunning.	
No reporting on welfare outcome measures.	0
The company partially reports on welfare outcome measures but this reporting is limited to certain geographies, species or products.	1
The company reports fully on one welfare outcome measure for each relevant species, covering all geographies and products.	3
The company fully reports on multiple welfare outcome measure for each relevant species, covering all geographies and products.	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), for fish: survival rates.
  - 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).
- Scores were awarded for some health indicators (e.g. somatic cell count and mastitis for dairy cows), although strictly speaking these are not regarded as WOMs. However, points were 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.

Question 27. Does the company provide an explanation of progress in performance for welfare outcome measures?	
Companies should provide an explanation of progress in performance and clearly define the scope of reporting (i.e. by geography, by species, by production system, by welfare outcome). For retailers and wholesalers, this question applies to all own-brand products.	
The company does not provide an explanation of progress in performance for welfare outcome measures	0
The company provides an explanation of progress in performance for at least one welfare outcome measure, but this is limited to certain geographies, species, or products.	3
The company provides an explanation of progress in performance for at least one welfare outcome measure for each relevant species across all geographies and products.	5
	(Max Score 5)

Explanatory Notes:
- We awarded scores for companies that provided an explanation of progress for outcome-based measures which are indicators that relate to the physical and mental wellbeing of the animals themselves. See Q26 for specific examples.
- The purpose of this question was to encourage companies to provide a narrative on current challenges and opportunities that aid or hinder progress on welfare outcome measures.
- 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.

Question 28. What proportion of laying hens (for shell eggs and fresh/frozen products and ingredients) in the company's global supply chain is cage-free?	
Companies making public commitments to source cage-free eggs should report on the proportion of own-brand shell eggs and eggs used as ingredients that is from cage-free hens. NB. Companies that report on the proportion of shell eggs or eggs as ingredients that is sourced from laying hens that are cage-free but do not specify the scope will be awarded minimal points. For retailers and wholesalers, this question applies to all own-brand products.	
0% of laying hens is cage-free, or no reported information.	0
1 – 20% of laying hens is cage-free.	1
21 – 40% of laying hens is cage-free.	3
41 – 60% of laying hens is cage-free.	5
61 – 80% of laying hens is cage-free.	7
81 – 98% of laying hens is cage-free.	9
99 – 100% of laying hens is cage-free.	10
	(Max Score 10)[i]

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 minimal points.
- Companies that reported on the proportion of laying hens that is cage-free but limited their reporting to specified products and/or geographies were either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting is substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- 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 is cage-free (e.g. with statements such as: 'xx% of our animals…').
- We expected companies to report impact figures in an easy to understand format and with a clear description of the proportion of the supply chain represented without relying on the assessor to make any calculations.

Question 29. 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?	
Companies making public commitments to source sow-stall-free or gestation-crate-free pork should report on the proportion of sows that are free from stalls. NB. Companies that report on the proportion of fresh/frozen pork products and ingredients that is sourced from pigs that are free from sow stalls but do not specify the scope will be awarded minimal points. For retailers and wholesalers, this question applies to all own-brand products.	
0% of sows is free from sow stalls, or no reported information.	0
1 – 20% of sows is free from sow stalls.	1
21 – 40% of sows is free from sow stalls.	3
41 – 60% of sows is free from sow stalls.	5
61 – 80% of sows is free from sow stalls.	7
81 – 98% of sows is free from sow stalls.	9
99 – 100% of sows is free from sow stalls.	10
	(Max Score 10)[i]

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 sows that are free from sow stalls.
- 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.
- 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 minimal points.
- Companies that reported on the proportion of sows that is free from sow stalls but limited their reporting to specified products and/or geographies were either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting was substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- 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 is 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 is free from sow stalls (e.g. with statements such as: 'xx% of our animals…').
- We expected companies to report impact figures in an easy to understand format and with a description of the proportion of the supply chain represented, without relying on the assessor to make any calculations.
- Companies that made statements on the proportion of sows that are free from stalls, (after the insemination period) needed to be transparent and clearly state how long this confinement period is, in order to receive points.

Question 30. What proportion of fresh/frozen milk or milk products and ingredients in the company's global supply chain is sourced from cows that are free from tethering?	
Companies making public commitments to source milk from dairy cows that are not tethered should report on the proportion of own brand milk and milk products (including ingredients) that are from dairy cows that are not tethered. NB. Companies that report on the proportion of milk or milk products and ingredients that is sourced from cows that are free from tethering but do not specify the scope will be awarded minimal points. For retailers and wholesalers, this question applies to all own-brand products.	
0% of dairy cows is free from tethering, or no reported information.	0
1 – 20% of dairy cows is free from tethering.	1
21 – 40% of dairy cows is free from tethering.	3
41 – 60 of dairy cows is free from tethering.	5
61 – 80% of dairy cows is free from tethering.	7
81 – 98% of dairy cows is free from tethering.	9
99 – 100% of dairy cows is free from tethering.	10
	(Max Score 10)[i]

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 minimal points.
- Companies that reported on the proportion of cows that are free from tethering but limited their reporting to specified products and/or geographies were either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting was substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- 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 is 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 is free from tethering (e.g. with statements such as: 'xx% of our animals…').
- We expected companies to report impact figures in an easy to understand format and with a description of the proportion of the supply chain represented, without relying on the assessor to make any calculations.

Question 31. What proportion of broiler chickens for own-brand fresh/frozen products and ingredients in the company's global supply chain is reared at lower stocking densities (specifically, 30 kg/m2 or less)?	
Companies making public commitments to source broiler chickens to higher welfare standards should report on the stocking densities of own brand fresh and frozen chicken meat and ingredients. NB. Companies that report on the proportion of broiler meat that is sourced from broiler chickens reared at lower stocking densities but do not specify the scope will be awarded minimal points. 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 is reared at lower stocking densities, or no reported information.	0
1 – 20% of broiler chickens is reared at lower stocking densities.	1
21 – 40% of broiler chickens is reared at lower stocking densities.	3
41 – 60% of broiler chickens is reared at lower stocking densities.	5
61 – 80% of broiler chickens is reared at lower stocking densities.	7
81 – 98% of broiler chickens is reared at lower stocking densities.	9
99 – 100% of broiler chickens is reared at lower stocking densities.	10
	(Max Score 10)[i]

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 minimal points.
- Companies that reported on the proportion of broiler chickens that is reared at lower stocking densities but limited their reporting to specified products and/or geographies were either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting was substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- 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 is 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 (e.g. with statements such as: 'xx% of our animals…').
- We expected companies to report impact figures in an easy to understand format and with a description of the proportion of the supply chain represented, without relying on the assessor to make any calculations.

Question 32. What proportion of laying hens in the company's global supply chain is free from beak trimming or tipping?	
Companies should report on the proportion of laying hens that is free from beak trimming or tipping. NB. Companies that report of the proportion of shell eggs or eggs as ingredients that is sourced from laying hens that are free from beak trimming or tipping but do not specify the scope will be awarded minimal points. For retailers and wholesalers, this question applies to all own-brand products.	
0% of laying hens is free from beak trimming or tipping, or no reported information.	0
1 – 20% of laying hens is free from beak trimming or tipping.	1
21 – 40% of laying hens is free from beak trimming or tipping.	3
41 – 60% of laying hens is free from beak trimming or tipping.	5
61 – 80% of laying hens is free from beak trimming or tipping.	7
81 – 98% of laying hens is free from beak trimming or tipping.	9
99 – 100% of laying hens is free from beak trimming or tipping.	10
	(Max Score 10)[ii]

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 minimal points.
- Companies that reported on the proportion of laying hens that is free from beak trimming or tipping but limited their reporting to specified products and/or geographies were either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting was substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- 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 is 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 is free from beak trimming or tipping (e.g. with statements such as: 'xx% of our animals…').
- We expected companies to report impact figures in an easy to understand format and with a description of the proportion of the supply chain represented, without relying on the assessor to make any calculations.

Question 33. What proportion of pigs in the company's global supply chain is free from tail docking?	
Companies should report on the proportion of pigs that is free from tail docking. NB. Companies that report on the proportion of fresh/frozen pork products and ingredients that is sourced from pigs that are free from tail docking but do not specify the scope will be awarded minimal points. For retailers and wholesalers, this question applies to all own-brand products.	
0% of pigs is free from tail docking, or no reported information.	0
1 – 20% of pigs is free from tail docking.	1
21 – 40% of pigs is free from tail docking.	3
41 – 60% of pigs is free from tail docking.	5
61 – 80% of pigs is free from tail docking.	7
81 – 98% of pigs is free from tail docking.	9
99 – 100% of pigs is free from tail docking.	10
	(Max Score 10)[ii]

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 minimal points.
- 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 either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting was substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- 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 (e.g. with statements such as: 'xx% of our animals…').
- We expected companies to report impact figures in an easy to understand format and with a description of the proportion of the supply chain represented, without relying on the assessor to make any calculations.

Question 34. What proportion of dairy cows in the company's global supply chain is free from tail docking?	
Companies should report on the proportion of dairy cattle that is free from tail docking. NB. Companies that report on the proportion of fresh/frozen milk products and ingredients that is sourced from cows that are free from tail docking but do not specify the scope will be awarded minimal points. For retailers and wholesalers, this question applies to all own-brand products.	
0% of dairy cows is free from tail docking, or no reported information.	0
1 – 20% of dairy cows is free from tail docking.	1
21 – 40% of dairy cows is free from tail docking.	3
41 – 60% of dairy cows is free from tail docking.	5
61 – 80% of dairy cows is free from tail docking.	7
81 – 98% of dairy cows is free from tail docking.	9
99 – 100% of dairy cows is free from tail docking.	10
	(Max Score 10)[ii]

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 minimal points.
- Companies that reported on the proportion of dairy cows that is free from tail docking but limited their reporting to specified products and/or geographies were either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting was substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- 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 is 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 is free from tail docking (e.g. with statements such as: 'xx% of our animals…').
- We expected companies to report impact figures in an easy to understand format and with a description of the proportion of the supply chain represented, without relying on the assessor to make any calculations.

Question 35. What proportion of the company's supply of chicken meat (fresh/frozen/processed and ingredient) comes from strains of birds with improved welfare outcomes and with a slower growth potential (defined as <55g/d averaged over the growth cycle according to the breeding company specification)?

Breeds of chicken selected for high growth rate, lean meat deposition and high feed conversion efficiency suffer a range of physiological and metabolic health issues, as well as poor immunity and walking ability. Such breeds are lethargic and have increasing meat quality issues. Breeds with slower growth potential tend to have better welfare outcomes. NB. Companies that report on the proportion of chicken meat that is sourced from slower growing strains but do not specify the scope will be awarded minimal points. For retailers and wholesalers, this question applies to all own-brand products.

0% of products is from strains of birds with improved welfare outcomes and with a slower growth potential, or no reported information.	0
1 – 20% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	1
21 – 40% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	3
41 – 60% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	5
61 – 80% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	7
81 – 98% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	9
99 – 100% of products is from strains of birds with improved welfare outcomes and with a slower growth potential.	10
	(Max Score 10)[iii]

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 chicken meat in the company's global supply chain that is from strains of birds with improved welfare outcomes and with a slower growth potential.
- 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 minimal points.
- Companies that reported on the proportion of chicken meat that is from strains of birds with improved welfare outcomes and a slower growth potential but limited their reporting to specified products and/or geographies were either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting was substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- Scores were not awarded for companies that reported on the proportion of chicken meat from birds managed according to particular farm assurance standards but did not explicitly report on the strains of birds with improved welfare outcomes and with slower growth potential in line with these standards.
- Companies that made general statements about "Our chicken meat" or "All chicken " being from strains of birds with improved welfare outcomes and a slower growth potential were not awarded points unless there was explicit reporting on the proportion of chicken meat that is from strains of birds with improved welfare outcomes and slower growth potential (e.g. with statements such as: 'xx% of our animals…').
- Where companies reported on their own breeds with improved welfare outcomes and slower growth potential, they needed to provide a clear description of how the company's breed standard(s) compare to other breeds with improved welfare outcomes and a slower growth potential.
- We expected companies to report impact figures in an easy to understand format and with a description of the proportion of the supply chain represented, without relying on the assessor to make any calculations.

Question 36. What proportion of animals (including fin fish) in the company's global supply chain is pre-slaughter stunned?

This question is looking specifically at measures linked to the slaughter of animals in their supply chains. It is essential to render an animal unconscious (through for example captive bolt and stun-to-kill methods including electrical stunning, gas stunning) before it is slaughtered in order for it to be insensible to pain, discomfort and stress, until death occurs. NB. Companies that report on the proportion of animals that have been pre-slaughter stunned but do not specify the scope will be awarded minimal points. For all companies, this question applies to all products (own-brand and other).

0% of products is from animals that have been pre-slaughter stunned, or no reported information.	0
1 – 20% of products is from animals that have been pre-slaughter stunned.	1
21 – 40% of products is from animals that have been pre-slaughter stunned.	3
41 – 60% of products is from animals that have been pre-slaughter stunned.	5
61 – 80% of products is from animals that have been pre-slaughter stunned.	7
81 – 98% of products is from animals that have been pre-slaughter stunned.	9
99 – 100% of products is from animals that have been pre-slaughter stunned.	10
	(Max Score 10)[iv]

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.
- 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 minimal points.
- Companies that reported on the proportion of animals that is pre-slaughter stunned but limited their reporting to specified products and/or geographies were either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting was substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- 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 was pre-slaughter stunned in line with these standards.
- 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 (e.g. with statements such as: 'xx% of our animals…').
- We expected companies to report impact figures in an easy to understand format and with a description of the proportion of the supply chain represented, without relying on the assessor to make any calculations.

Question 37. What proportion of animals (excluding fin fish) in the company's global supply chain is transported within specified maximum journey times?

This question is looking specifically at measures linked to the live transportation of animals in their supply chains. When being transported, animals can experience hunger, thirst, discomfort, pain, frustration, fear and distress, as well as physical welfare problems including injury, disease, and, in the worst cases, death. For these reasons, transport of live terrestrial animals should be minimised wherever possible and journeys should be kept as short as possible. Specifically, any transport of a live terrestrial animal that exceeds 8 hours, from loading to unloading, has been shown to decrease welfare significantly. NB. Companies that report on the proportion of animals that have been transported in 8 hours or less but do not specify the scope will be awarded minimal points. This question currently excludes finfish because the key welfare issues concern the pumping, crowding and poor handling of finfish, as well as the deterioration of water quality, especially the depletion of oxygen or accumulation of carbon dioxide and ammonia. For all companies, this question applies to all products (own-brand and other).

0% of animals is transported in 8 hours or less, or no reported information.	0
1 – 20% of animals is transported in 8 hours or less.	1
21 – 40% of animals is transported in 8 hours or less.	3
41 – 60% of animals is transported in 8 hours or less.	5
61 – 80% of animals is transported in 8 hours or less.	7
81 – 98% of animals is transported in 8 hours or less.	9
99 – 100% of animals is transported in 8 hours or less.	10
	(Max Score 10)[iv]

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.
- 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 minimal points.
- Companies that reported on the proportion of animals that is transported in 8 hours or less but limited their reporting to specified products and/or geographies were either awarded the equivalent of 1 or 3 points, depending on whether the scope of this partial reporting was substantial or not.
- If the scope of reported figures was unclear, companies were awarded minimal points.
- 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 was transported in 8 hours or less in line with these standards.
- 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 was transported in 8 hours or less (e.g. with statements such as: 'xx% of our animals…').
- We expected companies to report impact figures in an easy to understand format and with a description of the proportion of the supply chain represented, without relying on the assessor to make any calculations.

Notes

[i] For questions 28-31 (on close confinement), we only assess those questions that are relevant to the company. The maximum possible score being ten (10) points per question and we use the scores to calculate the overall average for these relevant questions.

[ii] For questions 32-34 (on mutilations), we only assess those questions that are relevant to the company. The maximum possible score being ten (10) points per question and we use the scores to calculate the overall average for these relevant questions.

[iii] For question 35 (on strains of birds with improved welfare outcomes and with a slower growth potential), we only assess this question if it is relevant to the company. The maximum possible score for this question is ten (10) points.

[iv] For questions 36-37 (on slaughter and transport), we only assess this question if it is relevant to the company. The maximum possible score for each of these questions is t en (10) points.

References

1 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/

2 These are: the avoidance of close confinement; the provision of effective species-specific environmental enrichment; the avoidance of products from animals subject to genetic engineering or cloning; the avoidance of growth promoting substances; the reduction or avoidance of antibiotics for prophylactic use; the avoidance of routine mutilations; the avoidance of meat from animals that have not been subjected to pre slaughter stunning; and the avoidance of long-distance live transportation.

3 This question was asked for the first time in 2019 and the scoring has been included in company scores for the second time this year. This is consistent with the way that the BBFAW has previously introduced new criteria.

4 Questions 28 - 37. The full list of questions is provided in the Appendix.

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

6 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/

7 Nicky Amos and Rory Sullivan (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).

8 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

9 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 significant 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.

10 Question 13 assessed whether or not the company has published objectives and targets for the management of farm animal welfare.

11 This includes Zhongpin Inc, a Chinese meat and food processing and distribution company based in China but listed on NASDAQ.

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