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Foreword

Hello, and welcome to the third iteration of Compassion in World Farming's ChickenTrack report focused on the United States—our assessment of progress made by leading food businesses against their commitments to source higher welfare chicken. This year's report is bigger than ever, and for the first time, we're reporting the progress made by companies in pursuit of the Better Chicken Commitment.

I'm filled with optimism that, despite an ongoing pandemic, lockdown measures, and supply chain troubles, some of the nation's largest food companies continue to make improvements in broiler chicken welfare by reducing stocking densities and providing enrichments so birds can rest and express natural behaviors.

The publication of an approved breeds list by the Global Animal Partnership last fall, based on research conducted at the University of Guelph, has both reinforced the need to shift to higher welfare breeds and provided a pathway for doing so. All the pieces are now in place for the 220 companies that have made the Better Chicken Commitment to honor the promise to their customers to provide reduced stocking densities, enriched environments, more humane slaughter, and regular auditing by 2024, and to use slower-growing chicken breeds by 2026.

Compassion's team of food business managers and animal welfare specialists are working hard with companies to raise the standard of chicken welfare throughout the US and beyond.

Thank you for taking the time to read this report and for coming on this exciting journey with us.



Sincerely,

Ben Williamson

US Executive Director

Compassion in World Farming



Introduction

To date, over 200 US companies across the food industry have committed to sourcing higher welfare chicken, aligning their standards with those of the North American Better Chicken Commitment. In doing so, they have pledged to not only improve the systems in which the birds are raised but also the welfare potential of the birds themselves. In 2021, several new companies adopted the Better Chicken Commitment. Momentum in the retail grocery space has been high, as several major grocery retailers updated their animal welfare policies in the last year to incorporate broiler chicken commitments. These updates promise higher welfare offerings for customers and demonstrate dedication to a more humane food system.

Not only have companies across sectors made commitments, but many are benchmarking with suppliers, roadmapping their transitions, and laying the foundations necessary for success. This work is essential to seeing the Better Chicken Commitment through and has enabled companies to begin disclosing progress.

Major food companies have advanced in their implementation despite still reckoning with the impacts and uncertainties created by the COVID-19 pandemic. Disruptions from the pandemic that began in 2020 have continued to affect the industry; in particular, increased input costs and labor shortages restricting supply have been ongoing challenges.¹ Fortunately, it is believed that the worst of the pandemic is now in the rear-view mirror for the industry.²

Accordingly, this year's ChickenTrack includes company reporting for the first time, highlighting and celebrating the progress made amidst the challenges of this unprecedented time. The twelve companies included have demonstrated an understanding of the importance of transparency by publicly reporting their progress towards the Better Chicken Commitment. We hope their example will serve to motivate other companies to share the meaningful progress they are making. The momentum in the broiler welfare space is palpable and is demonstrated by the companies featured in this report.



Better Chicken Commitment Overview & Update



Better Chicken Commitment Overview & Update

What is the Better Chicken Commitment?

The Better Chicken Commitment is a science-based policy designed to address the four most significant welfare concerns negatively impacting broiler chickens under today's production practices. There are two versions of the North American Better Chicken Commitment developed for food companies in the US and Canada. These two versions of the policy language address the same welfare concerns but allow for flexibility in the way that companies roadmap their supply chains to meet and demonstrate compliance with the Better Chicken Commitment.

To provide companies with additional clarity, Version Two now details specific environmental parameters—notably, these standards are inspired by and in line with those of Global Animal Partnership. Additionally, we are now recommending that all North American companies report progress annually, in line with broiler welfare commitment standards across the globe.

Version One

By 2024, we will source only chicken certified by Global Animal Partnership (G.A.P.) and require all chickens to be processed in a manner that avoids live-dumping and live-shackling, and instead utilizes a pre-shackle, multi-step controlled-atmosphere processing system that's widely hailed as more humane.

Version Two

By 2024, we will require our chicken suppliers to meet the following requirements for 100% of our products:

1. Maximum stocking density of 6.0 lbs./sq. foot and prohibit all forms of broiler cages.
2. Provide birds an improved baseline environment¹, including:
 - a. At least 3 inches of friable litter covering the whole floor of the house, managed to maintain dry, friable conditions and prevent caked or wet areas.
 - b. At minimum, 8 hours of continuous light (≥ 50 lux) and 6 hours of continuous darkness daily (< 1 lux).
 - c. One or more types of functional enrichment (such as perches, platforms, or straw bales) that multiple birds can use at any time. The enrichments must be available by 10 days old and maintained thereafter, dispersed throughout the house and available to the entire flock, with 1 enrichment for every 1,000 sq. ft. or 1 enrichment per 1,000 birds, at a minimum.

Version Two continued

3. Process chickens in a manner that avoids pre-stun handling and instead utilizes a multi-step controlled-atmosphere processing system that induces an irreversible stun.
4. Demonstrate compliance with all standards via third-party auditing and annual public progress reporting.

And by 2026:

5. Use only Better Chicken Commitment-approved breeds that demonstrate higher welfare outcomes.*

*Breeds that have been approved for use to meet the Better Chicken Commitment: JA757, JA787, JA957, JA987, JACY87, or Norfolk Black; Rowan Ranger, Rambler Ranger, Ranger Classic, Ranger Premium, or Ranger Gold; REDBRO, RedbroM; CS200, Cooks Venture Pioneer, or others that pass the breed welfare outcome assessments by either the Royal Society for the Prevention of Cruelty to Animals (RSPCA) or Global Animal Partnership (G.A.P.).

¹ Adapted with permission from Global Animal Partnership's 5-Step® Animal Welfare Rating Standards for Chickens Raised for Meat, Copyright 2018 Global Animal Partnership.



Which certifications meet the North American Better Chicken Commitment?

The table on the following page looks at today's most common US certification schemes and assesses, in checklist format, their potential to meet the criteria of the North American Better Chicken Commitment and thus improve broiler chicken welfare.

BROILER WELFARE CERTIFICATION CHECKLIST

BETTER CHICKEN COMMITMENT CRITERIA (US & CANADA)

	SPACE	LIGHTING	LITTER	ENRICHMENT	BREEDS	SLAUGHTER	AUDITING
CRITERIA → CERTIFICATION ↓	Indoor stocking density ≤ 6 lb/sq ft. No caged systems.	Min 8 hrs of continuous light (≥50 lux) & 6 hrs of continuous daily darkness daily (<1 lux).	≥3 inches of friable litter covering the full floor & managed to prevent wet or caked areas.	≥1 functional enrichment per 1000 sq ft or 1000 birds, which multiple birds can use at one time. Provided by 10 days of age & maintained thereafter.	Adopt breeds with higher welfare outcomes approved by the RSPCA or Global Animal Partnership (G.A.P.)	Avoid pre-stun handling & utilize a multi-step Controlled Atmosphere Stunning (CAS) processing system that induces an irreversible stun.	Demonstrate compliance with all standards via third-party auditing.
Global Animal Partnership¹ (G.A.P.) Step 1 & Above 	All cage systems are prohibited, as well as housing on slatted and/or wire floors. Max indoor stocking density - Steps 1-3: 6 lb/sq ft, Steps 4-5+: 5.5 lb/sq ft.	All Steps: Min 8 hours of ≥50 lux continuous light each day. Steps 2 & above: Only natural light from Jan 2022. Min 6 (Steps 1-2) or 8 hours (Steps 3-5+) continuous daily darkness (<1 lux).	All Steps: Full floor coverage in all houses with ≥3 in of friable litter, with no more than 10% caked. Soiled feather & litter quality assessments recorded for every flock at 15-20 days of age.	List of acceptable indoor enrichments is provided. Step 1: Min 1 type of functional enrichment per 1000 sq ft of indoor space. ≥2 different types of enrichments per 750 sq ft (Steps 2-3) or 500 sq ft indoors (Step 4). Indoor enrichments not applicable to Steps 5-5+.	All Steps: Only higher welfare breeds approved by G.A.P.'s Broiler Chicken Assessment Protocol can be used.	CAS not required. Slaughter methods that use pre-stun handling, e.g., shackling of live birds by both legs, are permitted. Step 5+: Chickens must be slaughtered on-farm using an on-farm slaughter facility or a mobile slaughter unit.	Authorized, independent third-party audits every 15 months (to capture any seasonal differences). A min of 50% of flocks are audited on farms with ≥4 flocks (min 1 inspection per location). Priority for older flocks to be audited (≥21 days of age or within 2 weeks before slaughter). Audits include observation of brooding, and catching & loading, at least once per 5-year certification cycle. Slaughter facilities must be third-party audited annually.
Certified Humane² 	Housing in cages, or on wire or slatted floors is prohibited. Max indoor stocking density 6 lb/sq ft.	Light intensity of ≥20 lux (from artificial or natural light sources) throughout the house, for a min of 8 hours a day. A min of 6 continuous hours of darkness per 24-hour cycle.	Full floor covered by dry and friable litter. No min depth specified. Wet and caked litter must be removed promptly.	For every 1000 birds, 15 standard sized long chopped straw bales, 2m of perch space, 1 pecking object should be provided by 10 days of age. Approved enrichments include: ramps, low perches, pecking blocks, straw bales, scattering of whole grains, cabbages, cauliflowers, sprouts, broccoli, rounded tubes, & hanging wooden blocks.	Care must be taken to select birds for high welfare traits & avoid genetic strains with undesirable traits. However, using breeds with verified higher welfare outcomes is not required.	CAS not required, but is endorsed as a humane slaughter method. When used, CAS systems must be designed to kill the birds (not just stunning). Slaughter methods that use pre-stun handling, e.g., shackling of live birds by both legs, are permitted.	Independent third party audits every 12 months. For group certifications, a minimum of 10% of producers are inspected.
American Humane Certified³ 	Maximum indoor stocking density 7 lb/sq ft, calculated using target weight of the birds. Use of cages not specifically prohibited.	Average daylight intensity of ≥10 lux throughout the house for a min of 8 hours each day (from artificial or natural sources). A min of 4 hours of continuous darkness (recommended ≥1 lux) each day.	Access to dry and friable litter at a min of 1 in deep is required at all times, but full floor coverage not specified. Wet litter is not allowed and should be replaced.	Enrichments strongly encouraged but not required.	No specifications or requirements on breed or genetic selection for higher welfare.	CAS not required, but auditing guidance covers standard operating practices for CAS. CAS systems can be used for stunning only (not stun-kill exclusively). Slaughter methods that use pre-stun handling, e.g., shackling of live birds by both legs, are permitted.	Independent third party audits are required every 12 months for recertification. Only 1 flock/house required to be audited per location. Auditors encouraged to observe loading, transport, and slaughter processes, but training documentation sufficient if these stages are conducted by an outside company.
Animal Welfare Approved⁴ 	From 4 weeks of age, each bird must have continuous daytime access to at least 4 sq ft ranging & foraging area. When climatic conditions pose a threat to the birds' welfare, each bird must be provided with a min of 0.67 sq ft indoor space & 2 sq ft additional foraging space (average 2.4 lb/sq ft based on 6 lb final body weight). Cages prohibited both indoors and on the range, and broiler chicks cannot be sourced from breeding stock kept in cages.	Birds have daily access to natural light outdoors for a min 50% of daylight hours. However, shelters & housing must allow natural light to enter.	Bedding (litter) must be clean, dry, mold-free, & replenished as needed. In stationary housing, bedding must be available to chickens at all times.	Access to forage from 7 days of age for a min 50% of daylight hours. Birds excluded from outdoor ranging & foraging areas must be provided vegetative material. Access to raised surfaces (e.g., perches, straw bales) from 4 weeks of age. Raised areas should be ≥4.5 in off the ground & provide a min 1 inch of perching space (or 1 sq inch of platform space).	Breeds must be chosen with consideration of their ability to thrive in the prevailing climatic conditions of the farm, in pasture-based, free range, outdoor systems. Their growth rate must not exceed 40 g/day averaged over their lifetime. Use of traditional (heritage) breeds is recommended.	On farm slaughter is recommended & CAS systems using argon or nitrogen are the preferred slaughter method. Multi-step CAS systems using carbon dioxide (CO2) for stunning or to stun-kill are also permitted, but must use ≥2 phases. Birds must be exposed to ≥30% CO2 for at least 1 minute before moving into higher CO2 concentrations. Shackling of live birds is not permitted without prior written permission, and is withdrawn once a slaughter facility that does not use shackles, and is within the maximum travel distance of 4 hours, is approved.	A qualified independent third party AWA farm auditor visits the farm (and the separate slaughter facilities if applicable) to conduct official inspections for recertification every 12 months. Only independent farmers, who own the animals & are responsible for their day-to-day care are eligible for AWA certification. Cooperatives & networks of independent farms are also eligible, but all farms must be audited in the group.
National Chicken Council⁵ 	Use of cages not specifically prohibited. Max stocking density based on target live weight: ≤ 4.5 lbs: 6.5 lb/sq ft; 4.5- 5.5 lbs: 7.5 lb/sq ft; 5.6 to 7.5 lbs: 8.5 lb/sq ft; 7.5 lbs: 9 lb/sq ft.	No min daytime light intensity specified. During the dark period(s), the light intensity must be ≤10% of the daytime light intensity. A min of 4 hours of darkness every 24 hours must be provided, but does not need to be continuous & can be in increments of 1, 2, or 4 hours.	Dry & friable litter should be provided throughout the house, but full floor coverage is not required. No min litter depth specified. Litter quality must be assessed in ≥2 houses per site.	Not addressed or required	Not addressed or required	CAS not required, but is covered as a humane slaughter method. Birds can be handled & shackled by their legs prior to stunning and/or killing.	Third-party auditing by an independent contractor, but no specifications around the frequency of audits. The number of flocks/locations audited is up to desire of the company. For larger operations, audits are recommended to cover the hatchery, a processing plant, & sample ≥3 of the grow-out houses on different farms (1 farm with chicks a min of 7 days old & 1 farm with birds within 7 days of processing).
USDA Organic⁶ 	Continuous total indoor confinement is prohibited, so caged systems cannot be used as permanent housing. Maximum stocking densities not addressed.	All animals must have year-round access to direct sunlight. However, there are no regulations specifying the light intensities and the lengths of daily light & dark periods.	Appropriate clean, dry bedding (litter) is required, and cannot be solely dried manure. No min litter depth addressed. Litter should cover all solid floors, but no min requirement for solid floor space in poultry houses.	Indoor enrichment not addressed. All animals must have year-round access to the outdoors, but no regulations covering the regularity or duration of daily outdoor access. Chickens may be confined indoors until 4 weeks of age. For poultry, enclosed runs without vegetation can qualify as a form of outdoor access.	Selection of breeds with regard to suitability for site-specific conditions and resistance to prevalent diseases & parasites. However, using broiler breeds with verified higher welfare outcomes is not required.	Not addressed or required	Accredited third-party certifying agents conduct on-site audits every 12 months of every operation that grows or handles organic products, including slaughter facilities. A certified organic slaughter facility must be used for processing meat that is to be marketed as organic.

¹Global Animal Partnership's 5-Step® Animal Welfare Standards for Chickens Raised for Meat v3.2
²HFAC Animal Care Standards for Chickens August 2014
³American Humane Certified Animal Welfare Standards for Broiler Chickens (May 2019)
⁴Certified Animal Welfare Approved by AWW Standards for Meat Chickens 2021
⁵National Chicken Council Animal Welfare Guidelines and Audit Checklist for Broilers (Sept 2020)
⁶7 CFR Part 205 enforced by the USDA Agricultural Marketing Service

KEY ✓ COMPLIANT ? UNSURE ✗ NOT COMPLIANT

Broiler Breed Research & Analysis

In January 2022, Compassion held a [webinar](#) to help companies better understand the breed component of the Better Chicken Commitment, as well as how to roadmap the supply chain shift to higher welfare breeds. The webinar included an overview of what defines a higher welfare broiler breed, an explanation of the G.A.P. breed assessment protocol, and an analysis of the University of Guelph's breed research with an eye towards sustainability considerations.

Defining a Higher Welfare Broiler Breed

Holistically, an animal with good welfare has more than just good health; they also have good mental wellbeing and the ability to lead a reasonably natural life. For broiler chickens, the opportunity to perform highly-motivated natural behaviors (e.g., foraging, dust-bathing, playing, and perching) allows them to experience positive emotions such as pleasure, comfort, and curiosity. Two types of measures—inputs and outcomes—allow for the objective assessment of an animal's welfare. Inputs relate to whether an animal has what they need and want to experience good welfare. Outcomes relate to how the animal can use inputs to demonstrate that they have good welfare. For example, research has identified that good genetics (an input) can ensure broiler chickens have good leg health and, as a result, are able to be active and use enrichments, like perches and straw bales, throughout their lives (an outcome).^{3,4,5,6,7,8,9}

Efforts to improve broiler chicken welfare should prioritize selection for traits that show clear improvements to bird welfare, which can be measured as positive changes to meaningful animal-based outcomes. For commercial breeds, this is done through a balanced selection for production traits (e.g., growth rates and feed intake) alongside key welfare outcomes. Compassion's guide, [Welfare Outcomes for Broilers](#), provides further information on setting outcome thresholds and targets for higher welfare breeds.

There is increasing interest in measuring and reporting welfare outcomes in the broiler industry. However, measuring welfare outcomes without a willingness to change and improve the inputs that influence them is unlikely to significantly improve chicken welfare. Underpinned by science, the Better Chicken Commitment gives a baseline standard of inputs to help ensure good welfare outcomes for broiler chickens. The components of the commitment work together to meaningfully improve the welfare of broilers when facing the realities of commercial production. For example, the latest broiler breed research continues to show that broilers will not benefit from enrichments like platform perches or straw bales if they do not have the space or physical ability (due to their genetic makeup) to use them in commercial barns.^{10,11}

Global Animal Partnership's Broiler Breed Assessment

The process for designing the G.A.P. breed assessment began with independent research conducted by the University of Guelph. This study evaluated approximately 7,500 individual birds from 16 different breeds of commercially available broiler chickens. To prevent unintended bias, the trials and analysis were conducted blindly and the breeds were anonymized. The evaluated breeds were divided into four categories based on their rates of average daily growth. The conventional strains represented the most common breeds found in today's industry-standard broiler production. The slower-growing strains were categorized as "Fast," "Moderate," or "Slow." The research showed that the current industry-standard breeds had significant trade-offs for their higher productivity. Namely, fast growth rate coupled with high breast yield is associated with poor welfare outcomes. This and other findings are now available online as peer-reviewed publications. A short assessment of the study's methodology and initial findings prepared by Compassion can be found [here](#).

After the completion of this research, G.A.P. assembled a multi-stakeholder technical working group composed of producers, breeding companies, animal advocates, and academic scientists to use the findings from the University of Guelph study to create its [first broiler breed assessment protocol](#). Future breeds tested using the protocol will be evaluated on twelve welfare outcomes at two target body weights: 5.5 lbs and 7 lbs (or, for those that never reach 7 lbs, a maximum of 84 days of growth). These outcomes include behavioral measures, leg health and mobility measures, number of mortalities and culls, and the incidence of myopathies to capture welfare and meat quality implications. Breeds that obtain an overall score of $\geq 80\%$ on the assessment are eligible for G.A.P. certification and therefore also approved for use in the North American Better Chicken Commitment. Eleven breeds from the Guelph study passed the assessment and were included in the initial G.A.P. [approved breeds list](#). Due to poor welfare outcomes, none of the conventional industry-standard breeds passed.

Sustainability & Market Considerations for Higher Welfare Breeds

This analysis of the University of Guelph research focuses on the market and sustainability implications of shifting to higher welfare breeds. As expected, the slower-growing breeds from the study are less efficient than the two conventional strains in terms of the quantity of meat produced overall. However, when comparing final meat yields, a key difference between the industry-standard breeds and slower-growing breeds is the type of meat produced. While breast meat yields are lower, they are supplemented by greater thigh, drumstick, and wing weights, which reflects selection for more evenly balanced birds with stronger legs.

Given how central breast meat is to the US broiler market, it is important to consider not only total yield but also meat quality, which can have important sustainability implications for reducing overall waste in the system. White striping, woody (wooden) breast, and spaghetti meat are breast muscle myopathies that reflect tissue degeneration and impact welfare, nutrition, and meat quality. Severe breast meat myopathies are more prevalent than most realize; for instance, woody breast alone is estimated to cost the US industry approximately \$200 million per year.¹² When evaluating yield, environmental footprint, and the ability to consistently deliver value to customers, meat quality is a very important consideration.

The University of Guelph research showed that conventional industry-standard breeds have a significantly higher incidence of woody breast and white striping than all but one of the slower-growing breeds.¹³ Thus, when looking at only the high-quality breast meat yield of birds without severe myopathies, the amount of breast meat yield actually flips. Comparing conventional breeds to three of the more feed-efficient slower-growing breeds in this way, the latter have 30-362% more breast meat.

Furthermore, the slower-growing breeds all have better feed conversion ratios than the conventional breeds when only considering yields of high-quality breast meat without severe woody breast. The slower-growing breeds also have 9-58% more total high-quality meat yield (including the thigh, drumstick, and wing yields) than the conventional strains. When considering production efficiency in terms of high-quality meat yield rather than total meat yield, the numbers tell a different story. If the total quantity of high-quality meat produced increases via a shift to slower-growing breeds, this would in turn increase the overall value of output and could help mitigate the increased input costs of making the transition.

Although breast meat has dominated the US market for a long time, growth in dark meat demand is well recognized across the industry and integrators are increasing investment in dark meat processing. A 2019 CoBank report points to changing consumer preferences reflected in the economics—the value of non-breast meat increasingly makes up a greater share of the overall value of the bird. Advances in technology are allowing producers to better capture the increased demand for dark meat. Projected higher prices for dark meat are increasing competitiveness, and there is potential for improved profitability by funneling more legs to the domestic market.¹⁴ For companies sourcing chicken aligned with the Better Chicken Commitment, there will be greater quantities of dark meat on the market and companies can take advantage of the price difference.

Peer-reviewed research has shown further potential environmental benefits of slower-growing higher welfare breeds. Given the impact of feed on broiler production's environmental footprint, it is notable that slower-growing breeds tend to have a lower reliance on high-energy, high-protein diets.^{15,16,17} This opens the door to incorporating alternative ingredients, such as nitrogen fixing pulses, that can be significantly more sustainable to produce. Decreased protein content in broiler diets has been shown to lower water intake due to a reduced need to excrete nitrogen.¹⁸ On the output side, decreases in dietary crude protein that are possible with slower-growing birds have outsized impacts on waste, with a 1% reduction of protein corresponding to a 10% reduction in nitrogen excretion.^{19,20,21} This can have a cyclical benefit because, with improved fecal quality and greater activity, higher welfare breeds tend to have better litter conditions.^{22,23} This translates to improved footpad and respiratory health for the birds and less work, lower costs, and decreased health risks for the farmer due to better air quality. With the shift to slower-growing breeds comes the strong potential to create a system with reduced environmental impact, improved working conditions, and higher broiler chicken welfare.

Transitioning to Higher Welfare Breeds

With G.A.P.'s approved breeds list in hand, it is time for companies to start internal and external conversations about transitioning their supply. Breed transition at scale won't happen overnight, but companies can begin the work now to set themselves up well for the future. Over the next few years, businesses should:

- Audit the standards and practices of their current suppliers and identify alternative suppliers if needed.
- Conduct sensory and cook testing with meat from higher welfare breeds.
- Develop and test new products that leverage the advantages of higher welfare breeds, such as those that emphasize quality breast meat and expand the use of dark meat.
- Encourage and/or partner with suppliers on exploring alternative feeds, which could mitigate or even reduce overall environmental footprint.
- Develop procurement and financial plans that work for their company, potentially leveraging longer-term contracts to mitigate costs.



Broiler Welfare Reporting Framework





Broiler Welfare Reporting Framework

In last year’s ChickenTrack report, Compassion laid out a framework to set companies up for success in transparently reporting progress against the Better Chicken Commitment. Companies that have publicly pledged to transition their broiler supply to aligned standards can report in one of two ways:

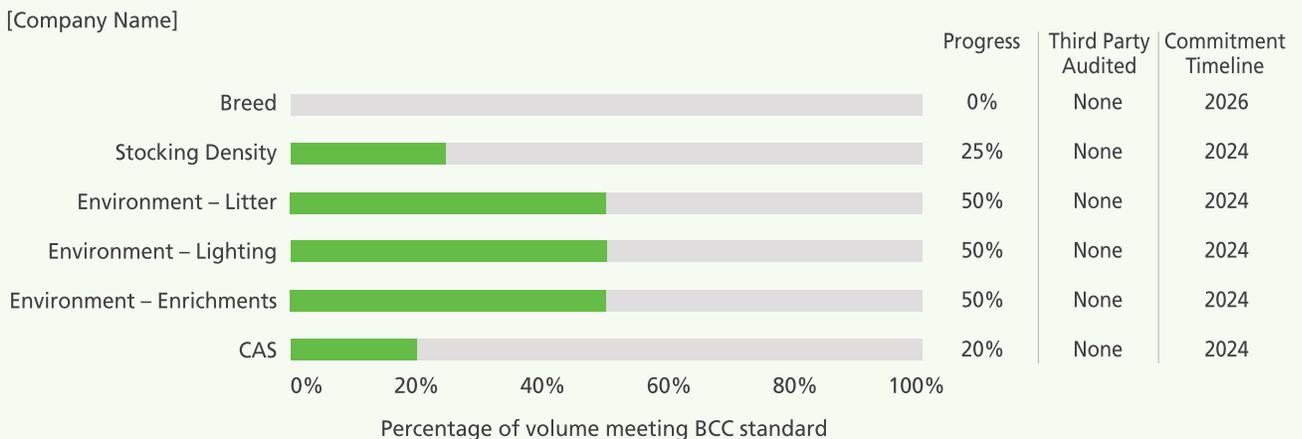
1) Publicly disclose the proportion (%) of chicken within your supply chain, in terms of volume purchased, that currently meets each individual component of the Better Chicken Commitment.

Using this first approach, companies should publicly disclose individual progress figures for breed, stocking density, environment, and controlled atmosphere stunning (CAS), and then state whether and by whom their compliant supply has been third-party audited for each component. If desired, progress towards meeting the environment standard can be broken out further into separate figures for litter, lighting, and enrichments.

Sample Disclosure:

“We have made a commitment to source 100% of our chicken supply from birds raised in alignment with the standards of the Better Chicken Commitment. We will do so for the stocking density, environment, and CAS components by 2024 and for the breed component by 2026. As of January 2022, 0% of the chicken we purchase in the US meets the breed standard, 25% meets the stocking density standard, 50% meets the environment (litter, lighting, and enrichments) standard, and 20% meets the CAS standard. Our Better Chicken Commitment-compliant supply is not yet third-party audited.”

Demo Tracker Display:



Reporting Framework continued

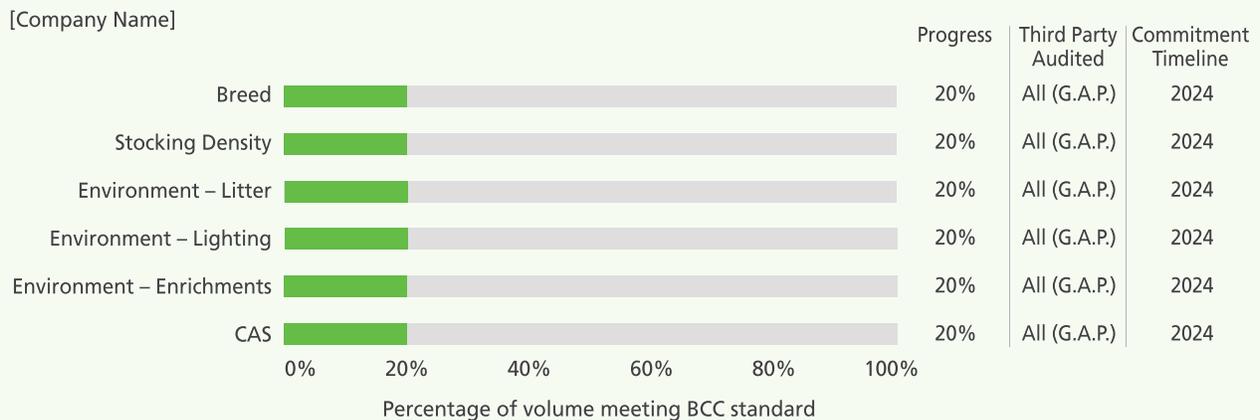
2) Publicly disclose the proportion (%) of chicken within your supply chain, in terms of volume purchased, that currently meets the Better Chicken Commitment standards overall.

Using this second approach, companies should publicly disclose a single figure that represents their progress across all Better Chicken Commitment standards (and state whether and by whom this compliant supply has been third-party audited). For example, if a company sources product for which progress has occurred evenly across every component, their reporting can be represented in a single figure. A company should *not* use this method if one or more of the standards is unmet, unless it is explicitly clarified which ones are excluded.

Sample Disclosure:

“We have made a commitment to source 100% of our chicken supply from birds raised in alignment with the standards of the Better Chicken Commitment by 2024. As of January 2022, 20% of the chicken we purchase in the US is audited through Global Animal Partnership to meet the Better Chicken Commitment standards for breed, stocking density, environment, and CAS.”

Demo Tracker Display:



In both approaches, we ask that companies clarify the product scope (e.g., fresh/frozen, processed) of their commitment and reporting when it does not cover all chicken within their supply chain.

We offer these two reporting methods because we recognize that companies will roadmap their Better Chicken Commitment transitions—and thus collect data—in different ways. We wish to remove barriers to transparent disclosure while also providing a clear and consistent framework for communicating progress.

In keeping with that goal, Compassion acknowledges that the contents of this year’s tracker may not be perfectly aligned with the framework presented. Our expectation for the future is that companies’ reporting will move towards this format. As companies progress and their reporting improves, our aim is to make the state of the industry’s transition to higher broiler welfare visible to all stakeholders.



Company Progress



Company Progress

Company Highlights

Applegate

Applegate has shown commitment to animal welfare through its mission of Changing the Meat We Eat, which the company defines as developing a system that better connects the health of humans, animals, and the planet. To improve welfare, they have spent the last several years certifying their entire broiler supply through Global Animal Partnership (G.A.P.) and Certified Humane; as of today, all broiler chickens that Applegate sources are certified by G.A.P. As a result, Applegate has reported impressive progress against the Better Chicken Commitment, reaching 100% for stocking density, environment, and auditing.

With this significant progress under their belt, Applegate continues to evaluate current suppliers and their animal handling in a holistic way to optimize outcomes from farm to processing. Though they have met a number of the Better Chicken Commitment criteria, they remain focused on constant progress and on working with suppliers to ensure improved welfare for broilers. For instance, Applegate has been working closely with suppliers using different stunning systems to audit animal welfare outcomes and product quality and has been collaborating with them as they evaluate the transition to multi-step controlled atmosphere stunning. By maintaining strong partnerships with suppliers, the company ensures continuous improvement for the lives of broilers in their supply chain.

Natural Grocers

Natural Grocers has long prioritized broiler welfare by partnering with brands whose values closely align with their own. By working with companies that are already utilizing third-party certifications for animal welfare, providing better feed, and going beyond baseline requirements, they have made higher welfare central to their sourcing. Keeping open lines of communication with suppliers has enabled them to maintain strong partnerships, identify problems as they come up, and work directly with their brands to find solutions. By holding routine check-ins, they stay abreast of what is new and exciting as well as any challenges they can collaborate on to manage.

As a result, Natural Grocers is well on their way to meeting the Better Chicken Commitment. The company is currently reporting that over 90% of the chicken they sell meets Better Chicken Commitment requirements for stocking density, environment, controlled atmosphere stunning, and third-party auditing. They are working with their brands to connect with groups such as Compassion to tackle the remaining obstacles and transition supply chains to where they need to be to meet the commitment deadlines of 2024 and 2026.

Company Progress continued

Their efforts extend beyond strong supplier relationships. The company also highlights their standards for customers at the point of purchase through their Meat Ranking System. This system outlines three tiers of product characteristics to help consumers better understand label claims and make informed decisions about the meat products they purchase. Their efforts have established a supply chain, from producer to consumer, that is dedicated to higher animal welfare.

Applegate & Natural Grocers: A Beneficial Partnership

Applegate and Natural Grocers have both exemplified a commitment to higher welfare for broilers, and their partnership demonstrates the synergistic effect that can come with supplier-purchaser relationships. Having a like-minded partner in each other has allowed both companies to advance toward their commitments to higher standards. By emphasizing collaboration and partnership along the supply chain, they have made and continue to make substantial progress.

Brands and retailers are often the main touchpoints for consumers and thus are trusted to be transparent about their practices and sourcing. In the case of Natural Grocers and Applegate, directly connecting the retailer to the farm means that the farm is also more connected to the customer. Natural Grocers is intentional about training their staff on their high standards and what their brands' farmers are doing. They can then educate engaged consumers at the point of purchase about what brands such as Applegate are doing and strengthen the connection to and appreciation for those brands and the farms they work with. The consumer brings this full circle by supporting the brands they know align with their values.

US Working Group for Broiler Welfare

In 2021, the US Working Group for Broiler Welfare was formed to provide an opportunity for companies to collaboratively approach, in a pro-competitive manner, how to improve broiler chicken welfare through the lens of the Better Chicken Commitment. Facilitated by Compassion in World Farming and Blue House Sustainability Consulting, the seven member companies include Aramark, Compass Group, Nestlé USA, Panera Bread, Shake Shack, Sodexo, and Target.

The Working Group has come together to explore practical strategies and creative solutions that will enable them to progress toward their commitments, shifting broiler chicken supply chains in a way that meaningfully improves welfare. We anticipate that the efforts and learnings of this group will create positive momentum and motivate widespread progress among the more than 200 US food companies that have committed to improving their welfare standards in alignment with the Better Chicken Commitment.

Working Group Members Weigh In:

"I am thrilled to join the Working Group as we push to improve broiler chicken welfare across the industry. Shake Shack's focus on premium ingredients, thoughtful sourcing and animal welfare has always been core to who we are. We're looking forward to learning from and collaborating with our peers to better understand barriers and potential solutions for accelerating improvements more broadly."

- Jeffrey Amoscato, Senior Vice President of Supply Chain & Menu Innovation, Shake Shack

Company Progress continued

“Bringing restaurant leaders together in the Working Group will help us collaborate and innovate across all parts of this important transition—from impacts on farmers to measurement of animal care. These discussions will help us as we continually strive to provide responsibly raised proteins.”

- Sara Burnett, Vice President of Food Values, Sustainability & Public Affairs, Panera Bread

Working Group Member Highlight: Aramark

Aramark has been working diligently on their transition to more humanely raised broiler chickens in the US, Canada, and Europe and deepened these efforts in 2021. Active participation in two cross-industry working groups, including the US Working Group for Broiler Welfare, has supported product identification and supply chain tracking aligned with their policies. Through participation in these groups, Aramark is working toward collaborative solutions that will enable this transition.

To benchmark their supply, they have surveyed vendors to better understand how they are progressing towards overall sustainability inclusive of improved broiler welfare, both more generally and specifically on the elements of the Better Chicken Commitment across the US, Canada, and Europe. Internally, Aramark has implemented a reporting structure that will allow them to identify specific products that meet one or more of their policy requirements, including breed, stocking density, environment, and controlled atmosphere stunning. Through this work, Aramark is laying the groundwork to follow through on their commitment and be transparent along the way.

As companies ramp up efforts to meet and disclose progress against their broiler welfare commitments, Aramark provides an example of identifying collaborative solutions, building the foundations for benchmarking and reporting, and carving out a path for success.





Company Reporting





Company Reporting

Transparent reporting is the cornerstone of ChickenTrack, as all information in the tracker is based on companies' publicly disclosed data. Public progress reporting demonstrates that a company holds themselves accountable to the commitments they make, communicating to investors, customers, and other key stakeholders that they take their social responsibility targets seriously. Additionally, disclosure of progress shows that a company has adequately prioritized their animal welfare commitments, thereby displaying a high level of managerial competency.

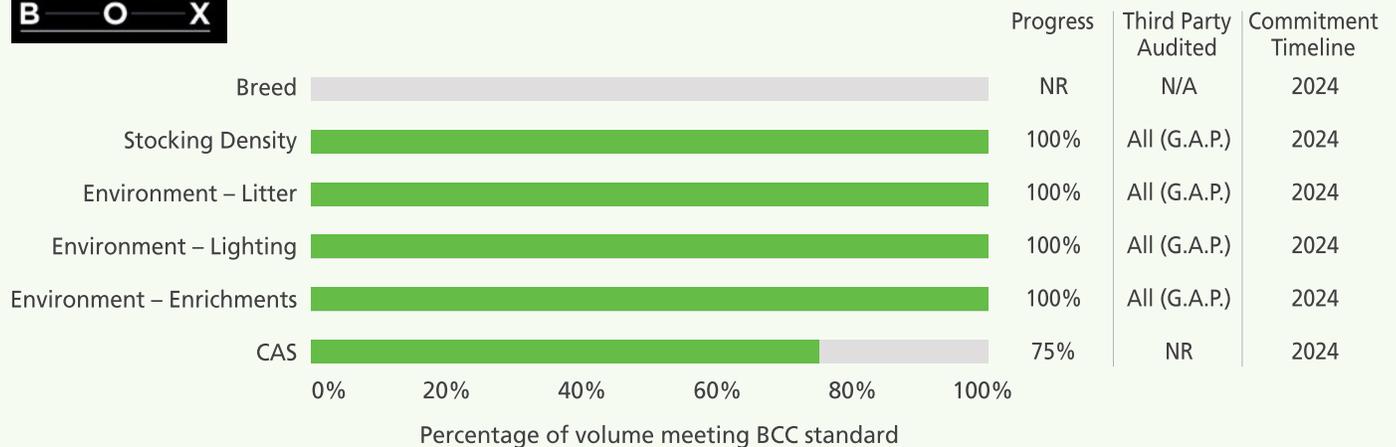
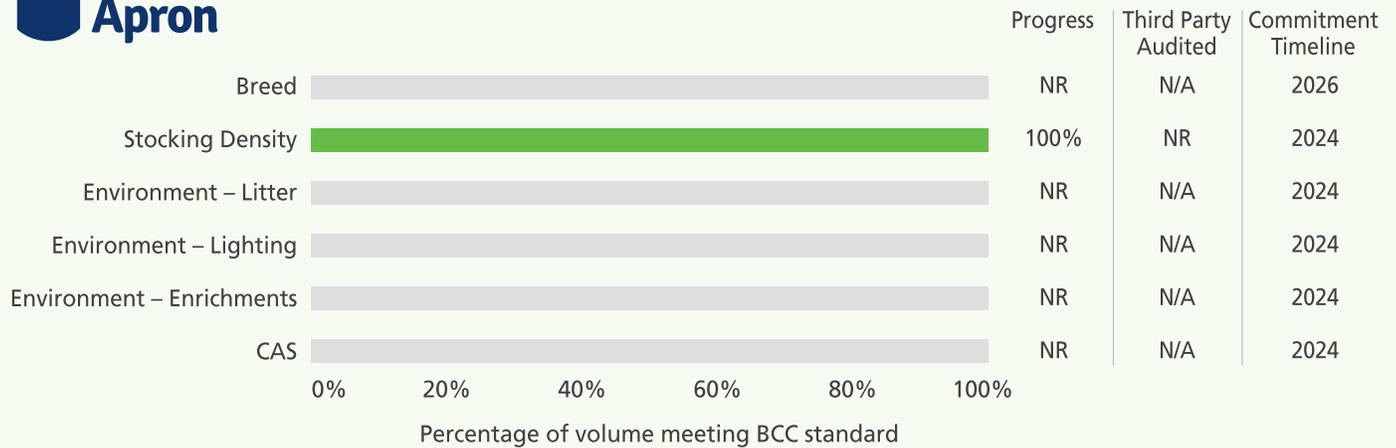
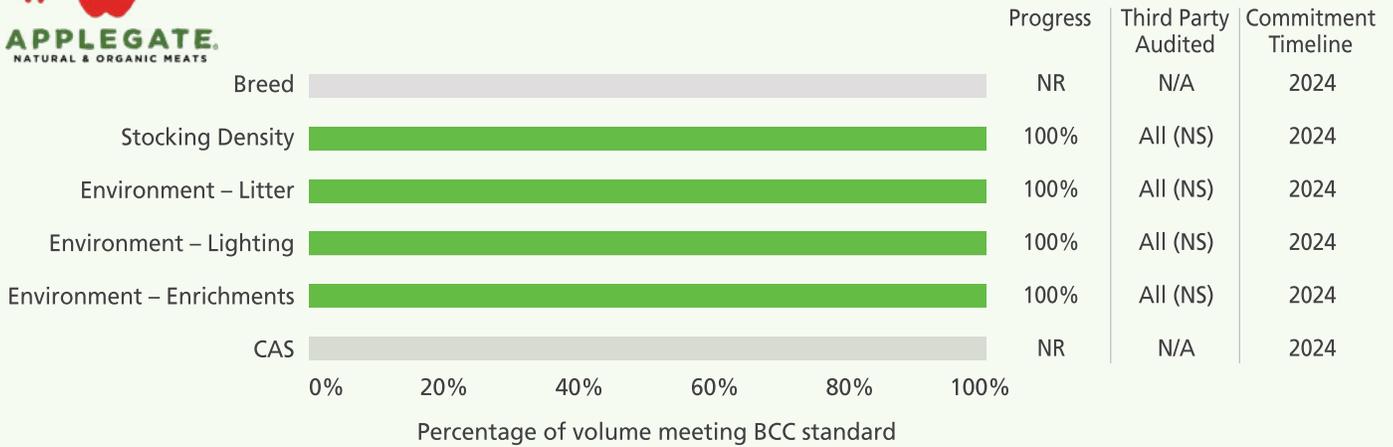
This year, ChickenTrack captures the public disclosures of twelve companies that reported progress against the Better Chicken Commitment. While the industry is in the early stages of the shift to higher broiler welfare standards, there is a pattern of progress emerging that could indicate the shape this transition will take as it continues to gather momentum in the coming years. The reporting companies have shown uneven progress across the components of the Better Chicken Commitment and appear to be moving in a stepwise manner towards their broiler welfare goals.

Given the recent release of G.A.P.'s list of approved higher welfare breeds, Compassion did not expect to see reporting against this component for 2021. It is therefore understandable that the progress we have seen from companies has been towards the standards for stocking density (12 out of 12 reporting), environment (10 out of 12 reporting), and to a lesser extent, controlled atmosphere stunning (7 out of 12 reporting).

Nine of the twelve companies included in this year's report stated that some or all of their Better Chicken Commitment-compliant supply had been audited by a third party. Of those nine, six specified the certification program used. We encourage companies to engage with certification programs early on to discuss auditing to Better Chicken Commitment standards. As the market continues to shift, we expect companies to improve visibility into this critical piece of their commitments.

Company Reporting continued

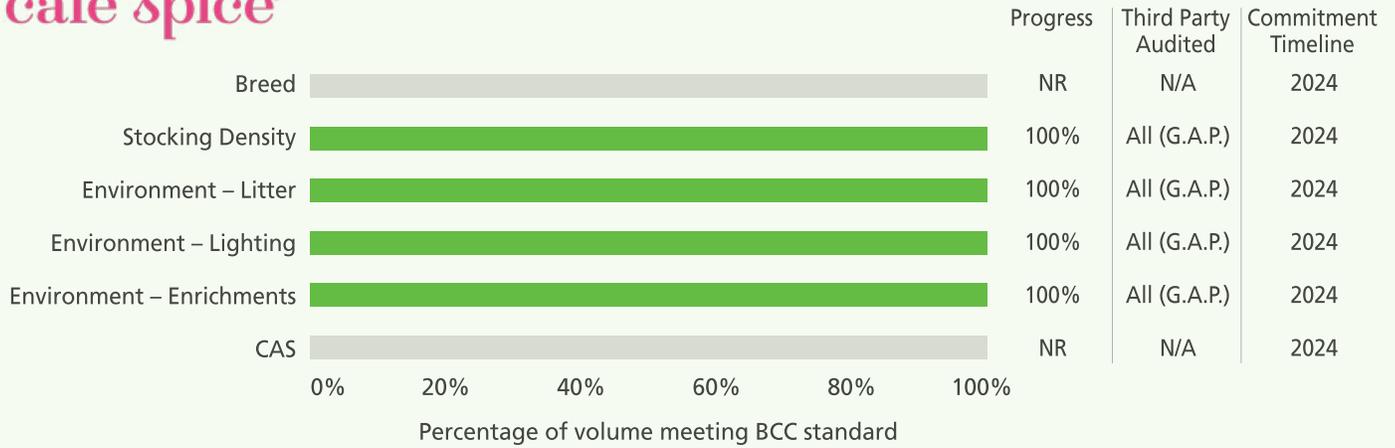
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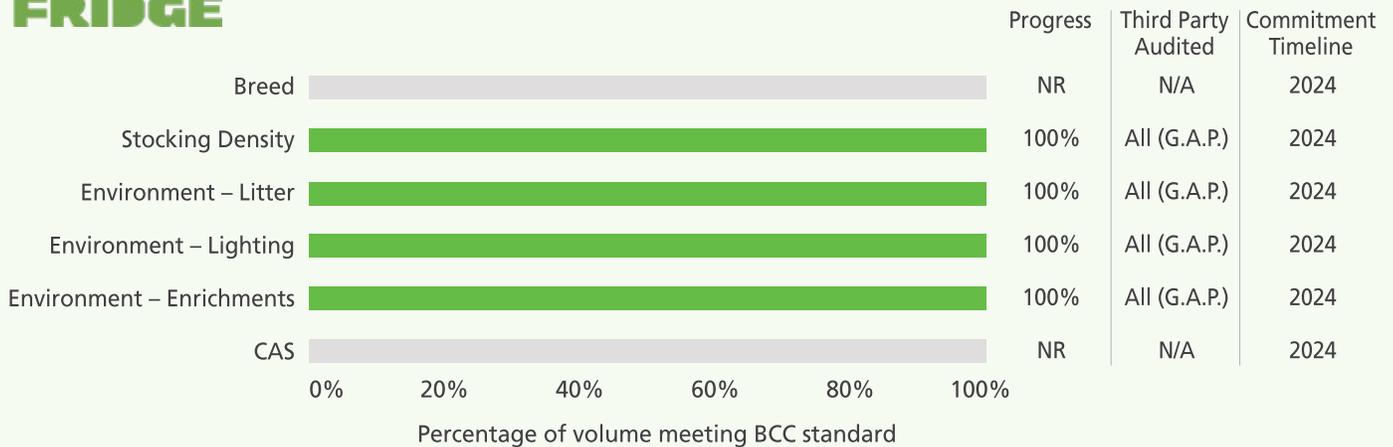
Company Reporting continued

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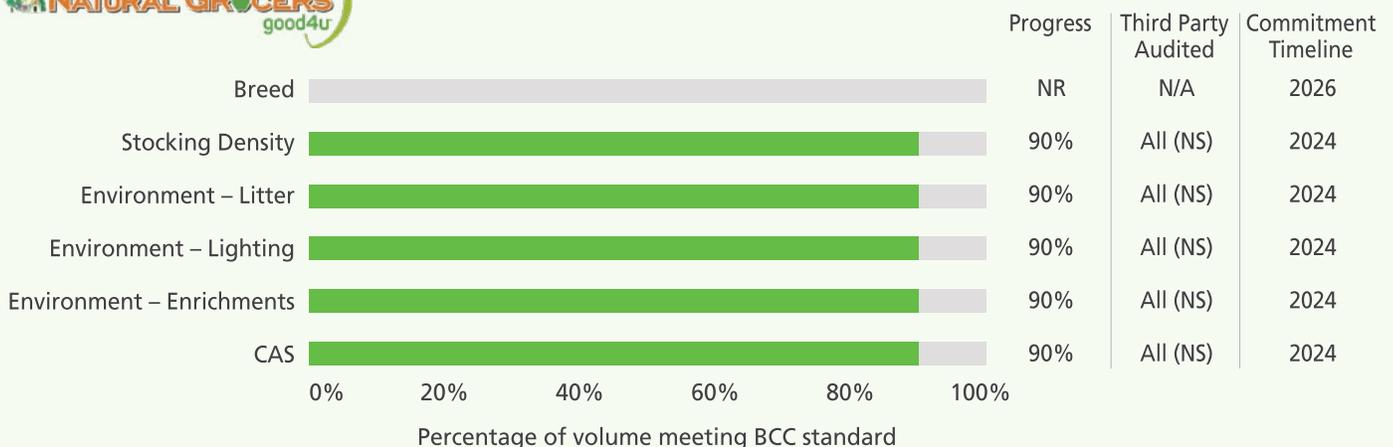
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FARMER'S FRIDGE

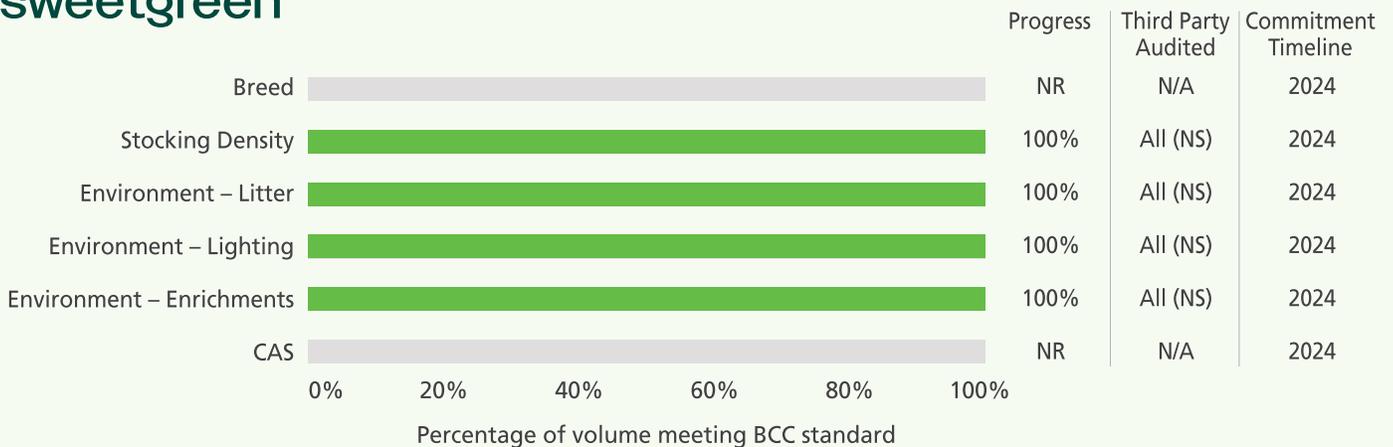
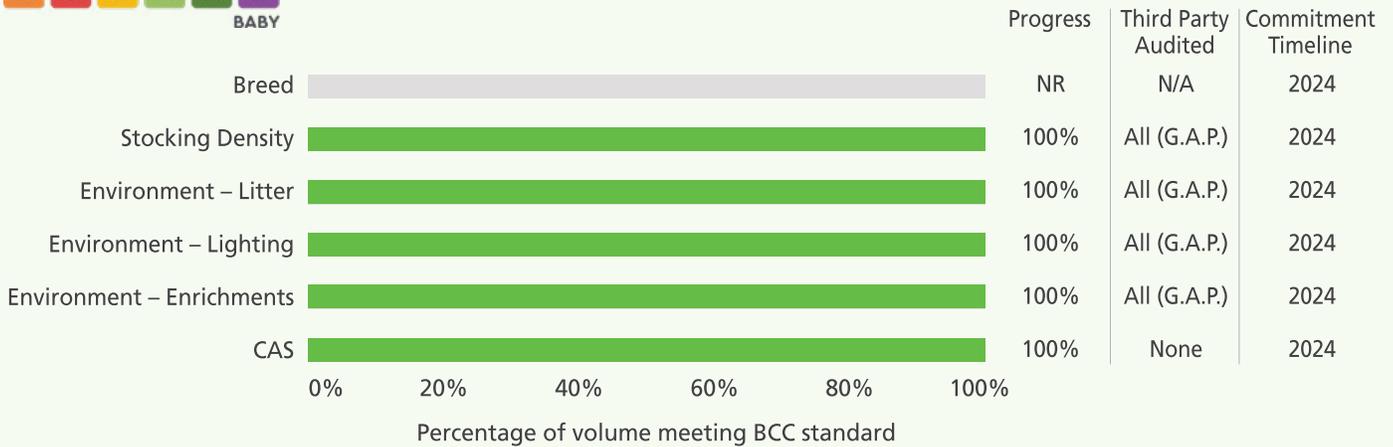
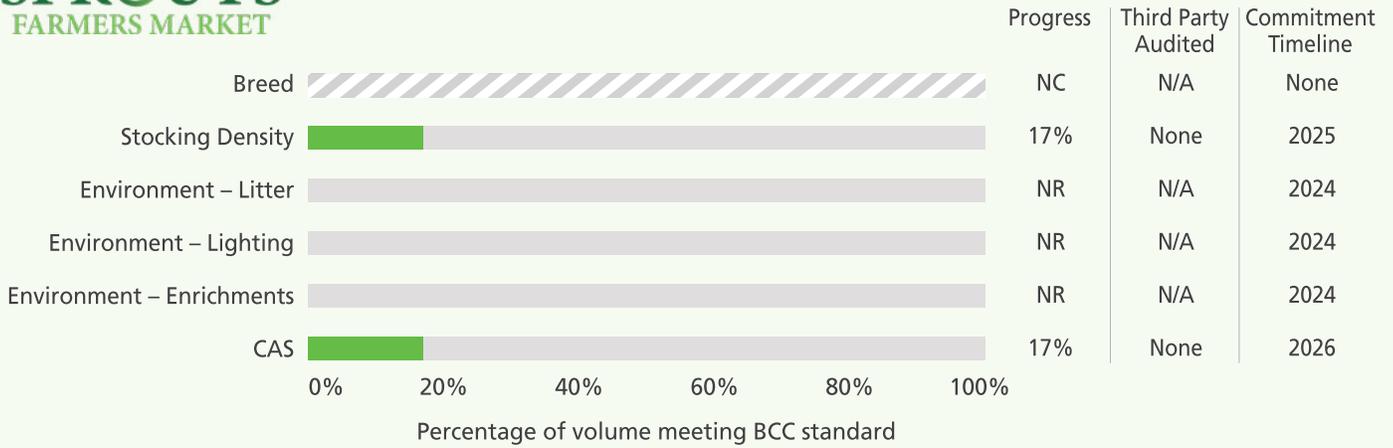


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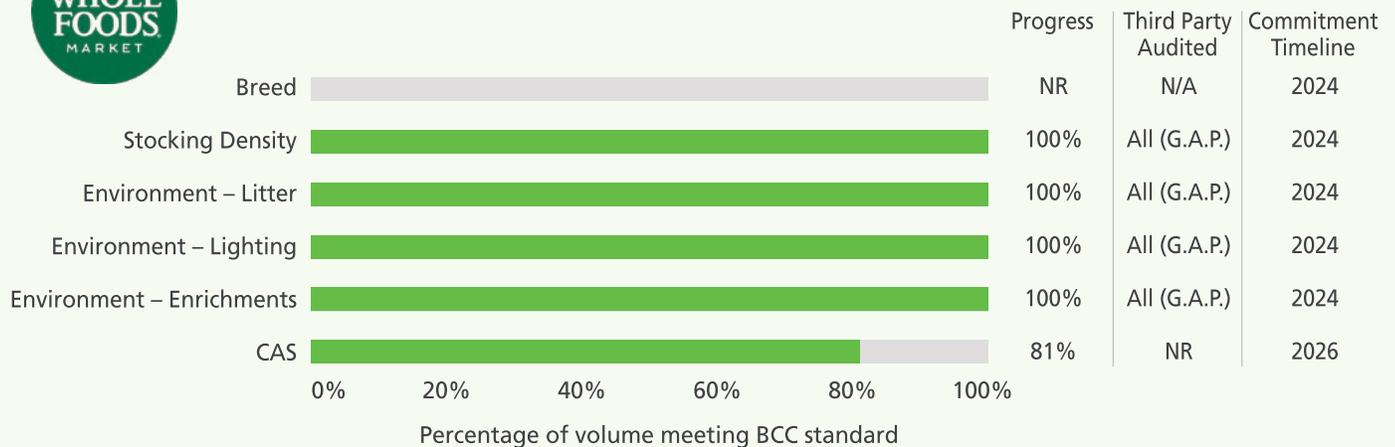
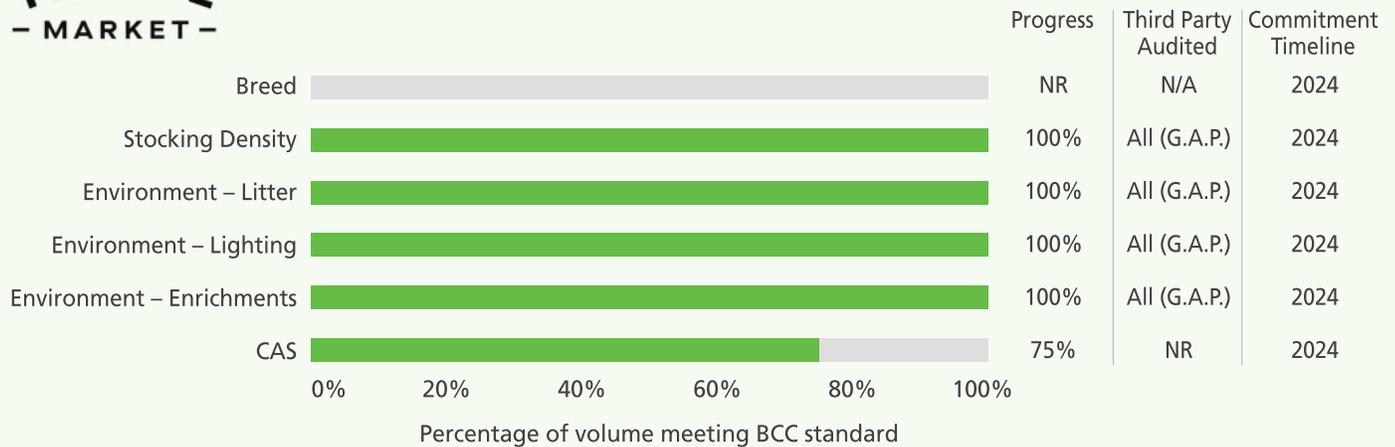
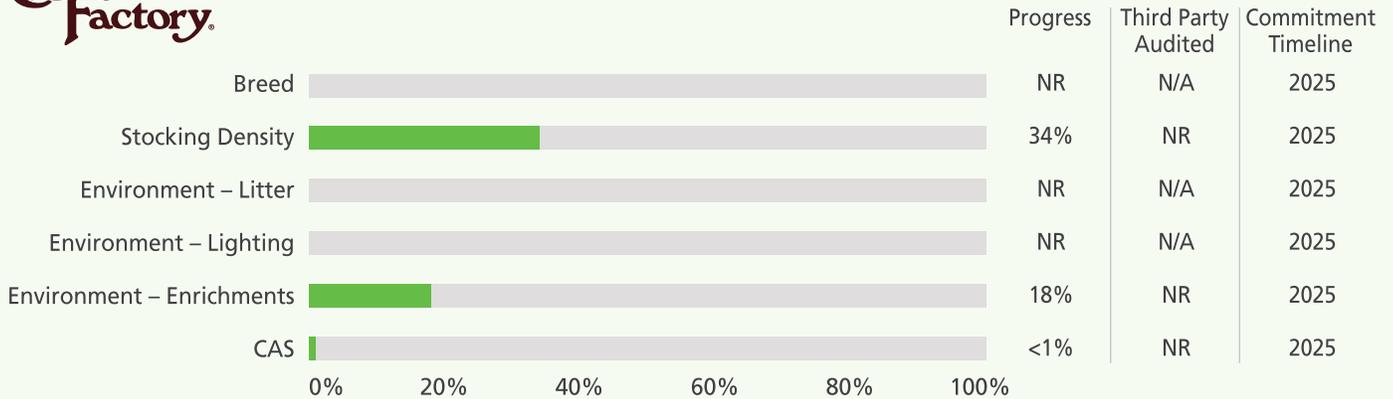
Company Reporting continued

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NC	No Commitment



Company Reporting continued

Key	
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NC	No Commitment





**Looking
Forward**



Looking Forward

Despite the ongoing impacts of COVID-19, companies continued to prioritize broiler welfare as a key part of their sustainability goals. They carried on the work of reviewing research, benchmarking supply, engaging with suppliers, roadmapping the transition, and—for a handful of leading companies—reporting their progress.

G.A.P.'s release of their highly anticipated assessment protocol and initial list of approved breeds has reinforced the importance of switching to higher welfare breeds and provides a pathway to do so. The approved breeds list has further expanded the number of strains that can be used to meet the Better Chicken Commitment in the nearer term and the assessment protocol has opened the door for other breeds to be assessed and potentially approved for use in the future.

There is a misconception that moving towards higher welfare breeds of commercial broiler chickens is about going back to heritage strains. Broiler breeding science has advanced incredibly in the last 50 years, and the higher welfare chickens of today are still exceptionally efficient producers compared to breeds of the past. All the parameters of the Better Chicken Commitment are important to improving broiler welfare, but breed is central to ensuring a sufficient welfare baseline.

As companies work toward the components of the Better Chicken Commitment, it is vital to consider the timelines upon which each criterion is feasible and to leverage that. It may be constructive for companies to establish incremental targets based on which components are most easily achieved. Though it will take a few years to transition to higher welfare breeds as flocks are built out in the US, reducing stocking density and providing enriched environments can be done in the near term, as demonstrated by current progress reporting. For components such as CAS and breed, which require substantial capital investment or advanced preparation, transition planning and conversations with vendors should begin as soon as possible. Working with suppliers to roadmap the components together can help companies plan for scaled adoption and avoid scrambling for supply as commitment deadlines approach.

As the industry shifts, transparency and public reporting remain vital. ChickenTrack will continue to capture the valuable progress made and help ensure that companies are moving forward together, easing the economics of the transition for all. To enable this work, some food businesses have participated in pro-competitive collaborative efforts, such as the US Working Group for Broiler Welfare. By leveraging the expertise and experiences of food businesses, civil society, and stakeholders along the supply chain, we can collectively ensure a transition that not only guarantees higher welfare for broilers but also mitigates risk to companies' bottom line. Compassion is working with others to dig into the research, answer questions, and help catalyze the initial steps forward. We encourage you to reach out to our US Food Business team to learn more.

A photograph of a large group of white chickens in a farm setting. In the foreground, a red plastic feeder is visible, with several chickens gathered around it. The ground is covered with straw. The background shows a dense group of chickens, some of which are slightly out of focus. The overall scene is a typical farm environment.

Appendix



Methodology

This year's report is the first iteration of ChickenTrack to include a progress tracker. In it, we have captured the public disclosures of twelve companies that reported progress towards the Better Chicken Commitment.

For progress numbers to be included in the annual report and displayed in the tracker, the relevant information must be publicly available on a company's website or in other documents including, but not limited to, an animal welfare policy; an ESG, CSR, or progress report; or a press release. Only information published within two years of our reporting deadline is considered accurate and up to date. This year, we have included companies based on whether they reported progress against the Better Chicken Commitment by January 31st, 2022.

The company information shown in the above charts was compiled during the first two weeks of February 2022. In capturing this data, we made several assumptions worth noting:

1. Because we ask companies to report in terms of volume of chicken purchased, we have assumed, unless otherwise specified, that this is the metric being used. Where a company's reporting language suggests that they use another metric to obtain their progress figure(s), we have reflected this in the following section entitled "Company-Specific Notes."
2. When a company reports that a percentage of their chicken supply is certified to G.A.P. standards, but they are not explicit about commitment timelines and/or progress figures for each component of the Better Chicken Commitment, we make the following assumptions:
 - a. Because the G.A.P. certification requires suppliers to meet the breed component by 2024, we assume a company has committed to this timeline where it is not stated outright.
 - b. Because the certification (at all steps) already requires suppliers to meet the Better Chicken Commitment standards for stocking density and environment, we have assumed that the proportion of a company's chicken supply that is G.A.P.-certified meets these standards even if that company does not disclose separate figures for these two components.
 - c. Additionally, if in this context a company makes no mention of breed, we have marked them as not reporting (denoted in the tracker as "NR"). G.A.P. certification is not a guarantee of compliance with the breed component until 2024.

As companies continue to make and report progress towards the standards of the Better Chicken Commitment, we encourage them to clarify these and other points—the metric used to measure progress, timelines for each component, product types covered by the commitment, third-party auditor or certification program employed—as much as possible.



Company-Specific Notes



The company has publicly stated that they will report on their status regarding the CAS component of the Better Chicken Commitment by 2023.



The company's stocking density reporting represents their progress in terms of percent of supply raised at "an average...of less than 6 live pounds per square foot."



The company has publicly stated that their chicken supply is certified at G.A.P. Step 3.



The company has publicly stated that their chicken supply is certified at G.A.P. Step 2.

They have also said that they will report on their status regarding the breed and CAS components of the Better Chicken Commitment by 2023.



The company has publicly stated that their chicken supply is certified at G.A.P. Step 2.

They have also said that they will report on their status regarding the breed and CAS components of the Better Chicken Commitment by 2023.

Company Notes continued



The company's commitment applies to "all the chicken we sell in our Fresh and Frozen Meat Departments, where chicken is the main ingredient."

Natural Grocers' stocking density, environment, and CAS reporting represents progress in terms of "the chicken we sell."

The company has stated that suppliers who do not have reasonable access to CAS will not be required to use it by 2024 if it is not yet affordable or geographically available, or if the supplier is small (i.e., processes 250,000 or fewer birds per week). Such suppliers must prove why CAS is not yet within reasonable access and must process birds in a way that avoids pre-stun handling and makes humane treatment a top priority. Natural Grocers will continue to re-evaluate this exemption on a case-by-case basis leading up to 2024.



The company has publicly stated that they "recognize the welfare issues experienced by conventional breeds of chickens raised for meat production and will monitor developments as research continues to evolve. We will continue to look for ways to adopt higher-welfare breeds into our supply chain."

Sprouts Farmers Market has also said that they "will verify [the stocking density, environment, and CAS] components with annual third-party auditing and will annually disclose our progress."

The company's CAS reporting represents their progress in terms of "the chicken sold."

Sprouts' commitment includes an incremental target to reach more than 60% for CAS by 2024.



The company has publicly stated that "34% of our supply comes from slower growth breeds and/or practices." However, the Better Chicken Commitment requires a shift to G.A.P. or RSPCA-approved slower growth breeds and does not consider slower growth practices to meet this requirement. Because this reporting leaves unclear how much of their supply comes from slower growth breeds alone (exclusive of practices), we have not included it in the tracker.



The company's commitment applies to "Thrive Market branded frozen chicken items" and does not apply to "packaged combination food products (such as soups, sandwiches, pizzas, burritos, and similar processed and prepared food products that are comprised of more than chicken meat with seasoning, curing agents, coloring, flavoring, preservatives, and/or similar meat additives)."

Thrive Market has publicly stated that their chicken supply is certified at either G.A.P. Step 3 or 4.

Company Notes continued



The company's commitment and reporting for the breed, stocking density, and environment components apply to "the chicken we sell across our Fresh Meat Department and found in Prepared Foods items made in-store."

Their commitment and reporting for the CAS component apply to "the fresh chicken that can be found in both our Meat and Prepared Foods Departments as well as our private label products."

Whole Foods Market currently exempts small and very small suppliers from the CAS component of their commitment. Small suppliers are defined as "processing 250,000 or fewer birds per week" and very small suppliers are defined as "processing 20,000 or fewer birds per week." According to the company, these make up "no more than 5% of our fresh chicken supply."

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Endnotes continued

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Compassion is recognized as the leading international farm animal welfare charity. It was founded in 1967 by Peter Roberts, a British dairy farmer who became concerned about the development of intensive factory farming.

For more information, visit www.ciwf.com.

Food Business Program

Compassion in World Farming's Food Business team works in partnership with leading manufacturers, food service businesses, restaurant chains, and supermarket retailers that have the ability to positively impact large numbers of animals in their supply chains.

We believe in collaboration and a solutions-led approach, developing relationships that are based on trust, mutual benefit, and recognizing progress.

For more information, visit <https://www.ciwf.com/food-business/>

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