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Chicken Track

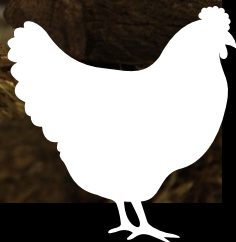
2022 European Report



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Contents

- 01** Foreword p.1
- 02** Introduction p.2
- 03** Market overview p.3
 - Case studies p.6
- 04** ChickenTrack 2022 p.11
 - Reporting by criteria p.13
 - Reporting by food sector p.14
 - Reporting by overall progress to BCC compliance p.17
 - No reporting p.18
 - Individual company commitment reporting by criteria p.19
- 05** It's time to act p.30
- 06** Looking forward p.31
- 07** Appendix p.32
 - BCC criteria p.32
 - Statement of Intent p.33



Foreword

Following the launch of our introductory ChickenTrack Report in 2021¹, which laid the foundations for measuring company progress on their Better Chicken Commitments, we are proud to present the findings of our first annual European ChickenTrack Report.

The 2022 report tracks the progress of 73 commitments made by 60 European companies² towards introducing the higher welfare requirements of the **Better Chicken Commitment (BCC)**³ and provides a baseline for tracking year-on-year industry progress. It is encouraging to see that progress is being reported for 42% (31 out of 73) of the commitments being tracked, with progress ranging from an average 21% for breed change to 54% for Controlled Atmospheric Stunning (CAS) across 21 and 19 commitments respectively. It is also encouraging to see that BCC-compliant chicken is on the shelves of major retailers – M&S in the UK, Carrefour in France and REMA 1000 in Norway.

While Compassion applauds those companies demonstrating progress and dedication to their Better Chicken Commitments, more than half (58%) of the commitments across 37 companies do not have any progress reported against them.

We recognise progress may be slower than originally intended, as companies continue to navigate the impact of a prolonged, difficult external landscape resulting from the COVID-19 pandemic, the war in Ukraine, rising inflation and the continued prevalence of the highly pathogenic avian influenza (HPAI). However, despite these challenges, it is imperative that companies continue to work on developing their implementation roadmaps and ongoing building blocks for success, to enable a smooth transition at scale when the economic environment improves.

We remain dedicated to supporting companies wishing to transition to Better Chicken and commend those that are demonstrating good progress, as highlighted in this year's report. We urge companies that have yet to sign up to join the movement and others that are yet to report, or prepare their implementation roadmaps, to act now.

Higher welfare chicken should be a priority for all food companies. Chickens are sentient beings and deserve a good quality of life as well as a humane end. By using more robust breeds and providing them with better living conditions they can live longer, healthier and more fulfilled lives. It is possible and it's what consumers expect.

T.A. Jones

Dr Tracey Jones

Global Director of Food Business,

Compassion in World Farming International



¹ <https://www.compassioninfoodbusiness.com/media/7448117/european-chickentrack-2021.pdf>

² In some cases, companies have made several individual commitments across multiple markets in Europe, for example Carrefour France, Italy, Poland and Spain. This report therefore tracks 73 commitments across 60 companies.

³ Also known as the European Chicken Commitment (ECC). The two names refer to the same initiative and set of criteria. The Better Chicken Commitment tends to refer to commitments taken at a national level, while the European Chicken Commitment is more commonly used for region-wide or multiple country commitments. For ease we refer to the Better Chicken Commitment (BCC) throughout the report and give specific examples of country scope where appropriate.

Introduction

A common characteristic of standard intensive production of any farmed species is the use of high performance breeds in confined and barren environments, often at the expense of the animals' physical and mental wellbeing. Intensive broiler chicken production fails to provide birds with sufficient space to live or a stimulating and complex environment to perform natural behaviours such as pecking, perching, walking and running.

Their breeding for high performance traits such as growth rate, breast meat yield and feed conversion efficiency, have led to birds becoming lethargic at a young age (spending up to 85% of their time sitting doing nothing), with poor walking ability and a myriad of health issues such as poor immune response and the early development of muscle myopathies, affecting the quality of the meat, such as 'white striping' and 'wooden breast'.

A large body of evidence shows that the most common method of broiler production is unable to deliver adequate welfare levels. The **Better Chicken Commitment** criteria⁴ were formulated in 2017 to address the areas of greatest concern in relation to broiler welfare, namely stocking density, breed, provision of natural light and environmental enrichment and humane slaughter. The intention being to raise baseline standards of chicken production across Europe and significantly improve the quality of life for meat chickens.

With over 350⁵ companies in Europe signed up to the Better Chicken Commitment, the landscape of broiler production is on the threshold of large-scale change. By signing up, developing implementation roadmaps and transitioning to BCC-compliant chicken, companies are at the forefront of a significant market shift and revolution for chicken welfare.

The 2022 European ChickenTrack Report details company progress against their commitments, to encourage transparency, drive compliance and celebrate transition. The data analysed is derived from publicly reported information shared on company websites and provides a snapshot of industry progress. Our wish is that companies review the findings, note the successes achieved by fellow industry leaders and be encouraged to follow suit with positive momentum and transparent reporting.



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⁴ <https://welfarecommitments.com/europeletter/>

⁵ ChickenWatch Commitment Tracker at: <https://chickenwatch.org/progress-tracker?filterK=Broiler>

Market overview

Chicken production reached 6.4 billion⁶ in the EU and UK in 2020 with only 8% of birds⁷ estimated to be reared in premium concept systems, which include various additional welfare requirements. It is anticipated that premium concept production (which includes BCC) will reach 15-20% in the EU by 2025⁷

UK

There have been more than 120 commitments from both national and international companies in the UK⁸, the majority coming from the out-of-home sector which includes contract caterers, Quick Service Restaurants and other food outlets. Two producers, PD Hook (Hatcheries) Ltd and 2 Sisters Food Group have pledged to supply chicken to the BCC standard. However, critically, only two retailers have signed up to the BCC: M&S and Waitrose. M&S is the first company in the UK to transition 100% of its fresh chicken successfully, under the Oakham Gold, RSPCA Assured label.

Other UK retailers have introduced a BCC-compliant fresh chicken tier, however, this typically makes up a small proportion of their full chicken offer. Tesco brought in its 'Room to Roam' range in April 2020 and Morrisons introduced its 'Space to Roam' range in February 2021. Sainsbury's announced plans to reduce the stocking density of its own-brand chicken to 30kg/m² by March 2023, but has yet to commit to breed change which is central to affording chickens a better quality of life.

Retailer commitments are essential to help build supply at pace and scale and to enable market access for others. We therefore urge all UK retailers to sign up to the BCC to galvanise market transition and make higher welfare chicken the industry norm.

European Broiler Production (2020)

- Poland, UK, Spain, France and Italy are the top five producing countries supplying 4.3 billion chickens⁶
- Poland leads the field, supplying one fifth of EU chicken meat production – 1.12 billion chickens⁶
- The Netherlands and Poland are the largest export markets exporting more than 2.1 million tonnes of chicken meat⁶
- The top producing European company⁸ is LDC in France producing 578 million chickens
- Three of the top ten European broiler producers are based in the UK⁹
- France and the UK have the greatest number of sign-ups to the Better Chicken Commitment

⁶ Source: FAO statistics database available at: <https://www.fao.org/faostat/en/#data>

⁷ Brockotter, F. (2019) Premiumisation to stay ahead of the pack. Poultry World, 9 August 2019. <https://www.poultryworld.net/home/premiumisation-to-stay-ahead-of-the-pack/> (accessed 04.11.22).

⁸ <https://www.wattagnet.com/directories/80-the-world-s-leading-broiler-turkey-and-egg-producers>

⁹ ChickenWatch Commitment Tracker at: <https://chickenwatch.org/progress-tracker?filterK=Broiler>

FRANCE

Since September 2021, all the major French retailers have signed up to the BCC, creating a dynamic impetus in the market. Sign-ups include key retailers such as ALDI, Auchan, Carrefour, E.Leclerc, Groupe Casino, Intermarché, Système U, Lidl and Schiever. Furthermore, the French animal welfare labelling system 'Etiquette Bien-Être Animal', launched in December 2018, supports market transition by offering these retailers a clear way to signpost consumers to their Better Chicken products on shelf. Level C of the labelling system serves as a guarantee to consumers that the BCC on-farm criteria are being met. Both Carrefour and Système U already stock Level C product on their shelves in a limited number of stores. The number of commitments in France has reached 110¹⁰ to date and also includes leading manufacturers and food service companies. The two leading French poultry producers LDC and Galliance are both able to supply higher welfare product to their customers but have not yet fully signed up to the Better Chicken Commitment. Galliance, however, aims to ensure that at least 50% of its total chicken production will comply with BCC requirements by 2026.

In France, higher welfare broiler production is certified by initiatives such as Label Rouge (free-range, slower-growing breeds, low stocking densities) and organic, representing almost 20% of French broiler production¹¹. Between these two production models and conventional production (high stocking density at 42kg/m² and fast-growing breeds), a clear opportunity for higher welfare chicken exists.

ITALY

While 26 food companies have signed up to the BCC, the majority of these are part of regional commitments from international companies, including bofrost*, Compass Group and Sodexo. The Italian retail sector is falling behind compared to other European countries, with only Carrefour, Cortilia and Eataly signed up to the BCC.

Gruppo Fileni is the only producer in Italy to have published a commitment to convert part of its production to meet the BCC criteria, which includes 100% of its organic and free-range supply chains by 2023, and at least 37% of its production by 2026.

¹⁰ ChickenWatch Commitment Tracker at: <https://chickenwatch.org/progress-tracker?filterK=Broiler>

¹¹ Synthèses Aviculture, n° 2021/373, Agreste, 2021

NETHERLANDS

The Netherlands has the highest share of chicken production from slower-growing breeds in Europe. Slower-growing chickens account for 40% of production¹² (and 100% of the fresh retail market). All the major retailers have signed up to Beter Leven 1-star and plan to complete this transition in 2023. See Table 1 to compare Beter Leven 1-star standards to the BCC standards.

SPAIN

There have been nine commitments in Spain including Aldi Spain, Alcampo (Auchan Spain), Carrefour Spain and Eroski – of which five are retailers. Eroski is the only company in Spain communicating on its progress. More engagement is needed to drive the market forward and create demand for higher welfare chicken, through continued sign-ups to the BCC.

POLAND

There are currently 25 companies signed up to the BCC, including Accor Hotels, Compass Group, Danone, Frosta, IKEA, Nestlé, Pizza Hut, Sodexo, Subway and Unilever. As in Spain and Italy, these are primarily part of regional commitments from international companies.

Of the top 20 retailers in Poland, only Auchan and Carrefour have commitments; neither company has reported on their progress to date. Polish producer Res-Drob has committed to implement the required standards of the BCC. While Drosed SA delivers slower-growing breeds to major retailers, they have yet to commit to all BCC standards.



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¹² van Horne, P. Vissers, L. (2022) Economics of slower growing broilers accessed 4th March 2023
https://www.eurogroupforanimals.org/files/eurogroupforanimals/2023-03/Wageningen%20UR%20-%20Factsheet%20Economic%20analysis%20of%20ECC-21dec2022_FINAL%20%281%29.pdf

Case studies

M&S
EST. 1884

M&S

Last year, we highlighted the rebranding and marketing that M&S had created to bring consumers on board with its transition to BCC-compliant chicken. This year we are delighted to share that from September 2022, M&S's higher welfare Oakham Gold chicken is now on the shelves with the RSPCA Assured label, making up 100% of its fresh supply.

M&S was the first UK retailer to sign up to the Better Chicken Commitment in 2018 and the first to start the transition, successfully securing a commercial deal with its supplier to convert all its Oakham chicken to Oakham Gold. This involved the gradual laying down of breeding flocks from the slower-growing Hubbard breed - birds that have been shown to lead longer, healthier and more fulfilled lives.

M&S offers more RSPCA Assured products than any other retailer and has topped the annual Business Benchmark on Farm Animal Welfare since 2013, winning multiple awards including our Special Recognition Award in 2021 for starting its transition to BCC. The changes it is making are testament to its dedication to improving the lives of chickens in its supply chain. Being the first to roll out entry-tier BCC product onto UK shelves, M&S has kicked off one of the biggest shifts in chicken welfare in a generation. As a retailer, it is leading the way in transforming the market and making higher welfare chicken the baseline standard for consumers.

Andrew Clappen, Technical Director at M&S Food, said: "We want to keep raising the bar to improve welfare. It's something we know our customers care deeply about and we do too. But it is also about delivering a tastier, better-quality chicken for our customers."





Beter Leven

Since the 1970s, there has been increasing public interest in Dutch agricultural production methods, with price-conscious consumers in the Netherlands demanding higher welfare alternatives. By 2007 several initiatives sought to occupy the 'middle ground' between the existing standard broiler production and the highest welfare systems and it was these initiatives which gave rise to the Beter Leven 1-star animal welfare label. Beter Leven 1-star is the first in a 1-2-3-level star system introduced by Dierenbescherming ('Dutch Animal Protection') and includes a maximum stocking density of 25kg/m², slower-growing breeds, a covered outdoor area and environmental enrichments.

Attempts to fill the gap between standard and higher welfare broilers met with limited success, most likely because of the **disparity between the price and what consumers were willing to pay**, but also because retailers continued to offer consumers cheaper, standard alternatives. By 2013 a group of primary producers, the Dutch Poultry Board and the association of retailers agreed on a new concept known as 'Kip van Morgen' (Chicken of Tomorrow) which focused on slower-growing breeds, stocking density limits of 38kg/m² and enrichment provision. The concept breached Competition Law and anti-monopoly regulations¹³, but clearly demonstrated potential for change and this opportunity was seized upon by Dutch animal welfare organization, Wakker Dier, whose successful and relentless campaigns, holding retailers to account and challenging consumers to stop buying low welfare chicken, became the catalyst for a shift in the market. The retailers at this point began to adopt varied models of the Chicken of Tomorrow concept and in March 2021, retailer Albert Heijn went a step further and made the transformational decision to commit to the Beter Leven 1-star quality mark across all its fresh chicken by January 2023. By August 2021 all the other national supermarkets had followed suit¹⁴.

These retailers, which own around 95% of fresh chicken sales in the Netherlands¹⁵, caused a 'ripple effect' across the sector. They created confidence with the producers to build their supply and charge more per bird¹⁴. Producer incomes remained largely stable and there was an additional health and economic benefit of lower antibiotic usage¹⁶. The removal of the low welfare option for consumers meant that this Beter Leven 1-star chicken (broadly in line with BCC requirements) detailed in Table 1 became the entry-level tier and made higher welfare chicken the norm for retailer sales in the Netherlands.

¹³ Poultry World (2021), accessed 9th December 2021 <<https://www.poultryworld.net/Meat/Articles/2021/8/A-better-life-for-all-Dutch-supermarket-chickens-784610E/>>

¹⁴ Bos, J. M., van den Belt, H., & Feindt, P. H. (2018) Animal welfare, consumer welfare and competition law: The Dutch debate on Chicken of Tomorrow

¹⁵ van Horne, P. L. M. (2020) Economics of broiler production systems in the Netherlands

¹⁶ Bergevoet, R., van Asseldonk, M., Bondt, N., van Horne, P., Hoste, R., de Lauwere C. and Puister-Jansen, C. (2019) Economics of antibiotic usage on Dutch farms,



Beter Leven - continued

We can draw parallels between this and the current trajectory of chicken welfare across the whole of Europe – for example in France, where 99% of the retail market has signed up to the Better Chicken Commitment. We can clearly see that food businesses with buying power, market share and influence can directly shape positive change. When decisive commitments are taken with collective effort, alongside responsible investment, determined implementation and proactive marketing, these higher welfare standards are not only commercially viable but transformational for the whole sector.

Table 1: Comparison between Beter Leven 1-star and the BCC standards

Sector	Beter Leven 1-star commitment	Better Chicken Commitment
Breed	Slower-growing breeds from approved breed list	10+ slow/intermediate breeds
Killing age - days (real average)	Min 56	No minimum
Max. stocking density (kg/m ²)	25 including covered run	30
Enrichment material	Straw bales + daily scattering of feed	2 pecking substrates + 2m usable perch space/1000 birds
Natural light	Yes	Yes
Stunning method	CAS	CAS or effective electrical stunning without live inversion

Case studies



Norsk Kylling

Winner of our Special Recognition Award 2022, Norwegian producer Norsk Kylling has converted 100% of its chicken production to meet the higher welfare criteria of the Better Chicken Commitment. The first to introduce the slower-growing, more robust Hubbard JA787 breed into Norway, Norsk Kylling provides almost 20% of the country's chicken and has a fully integrated value chain.

The producer has successfully demonstrated its firm belief that animal welfare can be both sustainable and profitable as its value chain requires three million fewer birds per annum to produce an equivalent amount of meat.

Norsk Kylling has achieved its transition through its 'Green Value Chain' project, which aims to set new environmental standards for the future of the food industry. As part of this project, it is looking to find alternative, locally sourced and sustainable chicken feed ingredients that require less land use, as 80% of its carbon footprint comes from feed. It has targets to use 100% soy-free feed by 2030, along with a 50% reduction in the feed's carbon footprint, a 40% reduction in feed-related diseases and a 30% reduction in land use for feed production.

Led by its Sustainable Innovation department, Norsk Kylling's novel feed ingredient initiatives focus on circular and renewable resources such as algae and microalgae - by-products from the fish farming industry, as well as insects and tunicates. Norsk Kylling's' ambition for novel feed corresponds with the UN sustainable development goals.

Read more about how Norsk Kylling has successfully implemented the Better Chicken Commitment [here](#)¹⁷.

¹⁷ <https://www.compassioninfoodbusiness.com/resources/case-studies/technical-case-studies/driving-higher-welfare-chicken-in-norway/>

Case studies



Pieminister

After committing to the BCC in 2021, Pieminister reports that it has been sourcing 100% of its chicken from a slower-growing breed since April 2022 and is now compliant with five out of the six criteria. Pieminister has integrated carcass utilisation in its transition strategy, allowing the company to use a greater balance of breast and thigh meat. This has the potential to assist with supply availability and cost mitigation. Importantly, Pieminister reports that as a result of this carcass rebalance, it has nearly halved the required number of birds in its supply chain. As before, this strategy has the potential to further assist cost and sustainability mitigation.



ChickenTrack 2022

As part of our reporting framework outlined in 2021, companies were advised to publicly disclose their latest progress ahead of 31st July 2022 deadline, in line with updates required for our other tools, such as the Business Benchmark on Farm Animal Welfare (BBFAW) and EggTrack.

We recognise that extensive time and effort sits behind company progress reporting and so flexibility was built into the deadline to acknowledge this and to ensure a more up-to-date analysis of the current landscape. We asked that information be made available either on company websites, in animal welfare policies, CSR progress reports or press releases.

Companies were given the option to report in one of two ways:

- 1) Publicly disclose the proportion (%) of chicken within their supply chain, in terms of volume purchased, that currently meets each individual criterion of the BCC
- 2) Publicly disclose the proportion (%) of chicken within their supply chain, in terms of volume purchased, that currently meets all BCC criteria (i.e. BCC-compliant product)

We applaud all companies that have shared their updates accordingly. Their progress can be seen in the following pages of this report.

In an update on our previous year's report, we are adding a progress bar for general third-party auditing, in addition to the bar for BCC-specific auditing. This enables transparency between third-party auditing for all chicken in a company's supply and auditing to a third-party scheme that matches the criteria of the BCC. [You can see how third-party audit schemes compare to the criteria of the BCC here¹⁸.](#)




¹⁸ <https://www.compassioninfoodbusiness.com/resources/broiler-chickens/how-welfare-schemes-compare-to-compassions-criteria-for-higher-welfare-broiler-chickens/>

Key findings

Compassion's first European ChickenTrack Report tracks 73 commitments from 60 companies. Twenty have European-wide commitments, 17 have partial commitments across Europe, and 23 operate only nationally. Companies were selected based on geographic relevance and size.

Of the **73 commitments**

-  **31 (42%) report progress**
-  **27 (37%) report progress against specific criteria**
-  **4 (5%) report progress against full BCC compliance**
-  **42 (58%) do not report progress**

While it is unsurprising that 58% of commitments have no progress reported, since many companies are in the early stages of their transition, we hope and expect to see year-on-year improvement as the market begins to shift at scale.



Reporting by criteria

For the 27 commitments reporting progress against specific criteria:

- Stocking density is reported for 25 commitments, with an average transition of 30%
- Breed change is reported for 21 commitments, with an average transition of 21%
- Natural light provision is reported for 23 commitments, with an average transition of 43%
- Enrichment provision is reported for 24 commitments, with an average transition of 47%
- Controlled Atmospheric Stunning (CAS) is reported for 19 commitments, with an average transition of 54%
- Auditing to BCC compliance is reported by one company only

Table 2: Transition of commitments reporting by criteria

Criterion	Stocking density <30kg/m ²	Breed	Natural light	Enrichment	CAS slaughter	Third-party auditing	BCC-compliant third-party auditing
Total no. of commitments reporting	25	21	23	24	19	15	1
Average transition across all commitments	30%	21%	43%	47%	54%	72%	N/A
Range of reporting	0%-100%	0%-100%	0%-100%	5%-100%	0%-100%	0%-100%	N/A



Reporting by food sector

Of the 27 commitments reporting against specific criteria:

- 12 are from Retailer and Meal Kit providers
- 9 are from the Restaurant sector
- 2 are from Food Service and Hospitality
- 4 are from Manufacturers
- For Retailers and Meal Kit providers, transition ranges from an average 37% for breed to 76% for CAS
- For Manufacturers, transition ranges from an average 7% for breed to 43% for CAS
- For Restaurants, transition ranges from an average 9% for breed to 51% for enrichment provision
- Only two Food Service companies are reporting - **Compass Group UK** is reporting on enrichment, natural light and third-party auditing; **Sodexo France** is reporting on stocking density only.

Table 3: Food sector commitments reporting type

Sector	No. of commitments	No. reporting by criteria	No. reporting by overall progress
Retailers & Meal Kit providers	29	12	2
Manufacturers	9	4	0
Restaurants	25	9	1
Food Service & Hospitality	10	2	1
Total	73	27	4



Table 4: Transition of commitments reporting by sector

Sector	Stocking density <30kg/m ²	Breed	Natural light	Enrichment	CAS slaughter	Third-party auditing	BCC-compliant third-party auditing (No. of companies)
Retailers & Meal Kit providers	42%	37%	48%	54%	76%	80%	1
Manufacturers	24%	7%	26%	25%	43%	0%	0
Restaurants	20%	9%	39%	51%	37%	80%	0
Food Service & Hospitality	9%	NR	44%	44%	NR	44%	0



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Individual commitment progress by company is provided on pages 19 to 29, however, some highlights are as follows:

- Norsk Kylling (Norwegian producer) is 100% compliant across its entire chicken production
- REMA 1000 (Norwegian retailer), who is predominantly supplied by Norsk Kylling, is 96% BCC-compliant
- M&S (UK retailer) is 100% BCC-compliant on its fresh chicken under the Oakham Gold label and is RSPCA Assured
- Danone EU (manufacturer) is 70% compliant for stocking density, natural light and enrichment; 60% compliant for CAS and 20% compliant on breed change
- Auchan and Groupe Casino (French retailers) have 93% and 100% transition on breed across all their own-brand fresh chicken
- Carrefour (French retailer) is 52% compliant on stocking density and breed change, and 40% compliant on natural light and enrichment, for all categories of own-brand chicken, and has Level C product in store (according to the French animal welfare labelling system 'Etiquette Bien-Être Animal')
- Greggs (UK restaurant) is 53% compliant for stocking density and 64% compliant for enrichment
- Papa Johns (UK restaurant) is 60% compliant for stocking density, 50% compliant for natural light, and 56% compliant for enrichment

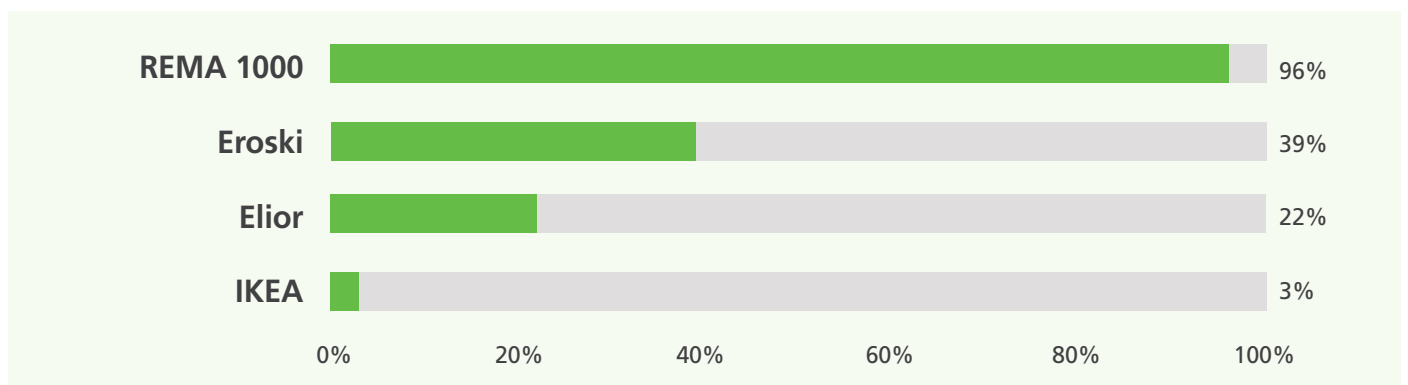
A cautionary note: Some retailers report progress against all their own-brand fresh and processed chicken and, in the cases of M&S and Waitrose, ingredient chicken. Others report progress only on their own-brand fresh chicken. The scope of the BCC is defined for each commitment and covers all own-brand fresh, frozen and processed products (containing 50% or more chicken) as a minimum across commitments. Since the majority of retailers are yet to report on the percent of own-brand fresh, processed and ingredient chicken in their total supply, we are unable to calculate progress accurately for fresh-only data. Percent transitions are therefore an overestimate for the retail sector. There are also other reporting variances that may affect average progress, such as reporting enrichment and natural light provision by shed as opposed to number or volume of chicken, as is the case with KFC (see page 25).



Reporting by overall progress to BCC compliance

The average transition for the four companies reporting on overall progress to BCC compliance is 40% (ranging from 3% to 96%).

Transition reporting on overall progress to BCC compliance



Reporting published by Elior covers France only and does not include reporting to BCC third-party auditing. Elior has an additional commitment to source at least 25% of its supply from farms with outdoor access (or wintergardens).

IKEA reports that 25% of its chicken volume sourced for its global range is compliant with its Better Chicken Programme, which represents volumes attached to its chicken meatball, equivalent to 13% of its total global chicken volume. We therefore interpret this as 3% of its global chicken volume. IKEA's Better Chicken Programme is broadly aligned with the BCC criteria but specification around enrichment, air quality, breeds and third-party auditing has not been detailed. Parameters may also change for supply coming from Asia-Pacific.

The remaining 4% of compliant chicken for REMA 1000 in Norway relates to chicken as an ingredient (e.g., spring rolls). REMA 1000 owns and is supplied by producer Norsk Kylling, whose transition is not included in the above statistics to avoid double counting.

No reporting

There is no progress reporting for 42 out of the 73 commitments being tracked in this year's report. We encourage companies to start reporting ahead of the 2023 ChickenTrack Report, to the strict methodology outlined in this report.

- Accor
- ALDI NORD (Denmark, France, Spain)
- API Restauration
- Aramark
- Auchan (Poland and Spain)
- Azzuri Group
- Bertrand Restauration
- Best Western
- bofrost*
- Bordeaux Chesnel
- Burger King (UK)
- Carrefour (Italy, Poland and Spain)
- CH&CO Catering
- Chipotle
- Colruyt
- Cooperl
- Delhaize Le Lion
- Domino's Pizza Enterprise
- Eataly
- GLH Hotels
- Gousto
- Groupe Holder
- Groupe Le Duff
- Herta
- Kraft Heinz
- Les Mousquetaires
- Lidl (Belgium)
- Nestlé
- Picard
- Pizza Express
- Pizza Hut
- Pret a Manger
- Prezzo
- SSP Group
- Taco Bell
- The Restaurant Group
- Yo! Sushi

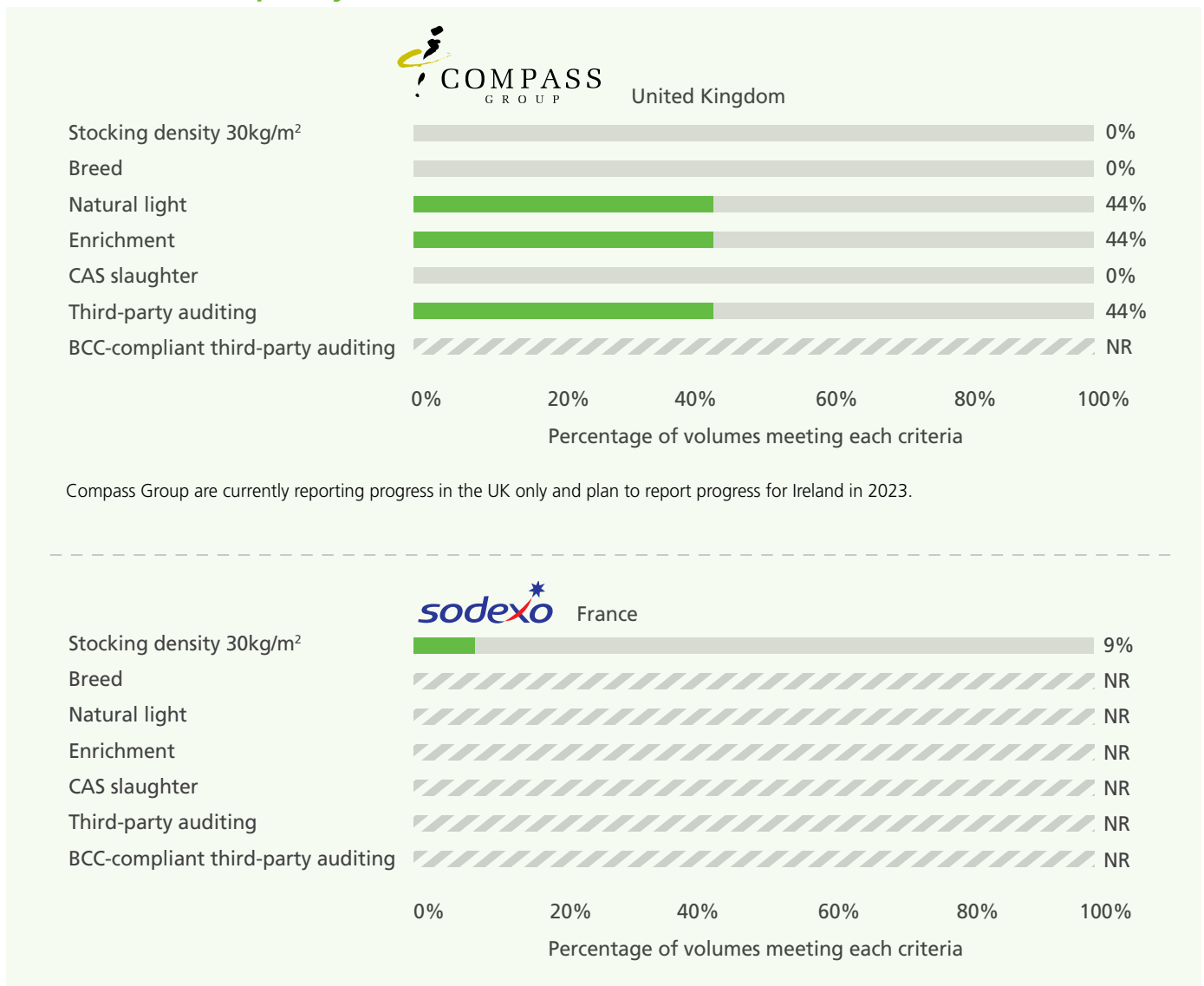


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Individual company commitment reporting by criteria

Detailed company reporting for the 27 commitments reporting progress against specific criteria, are shown below by food sector.

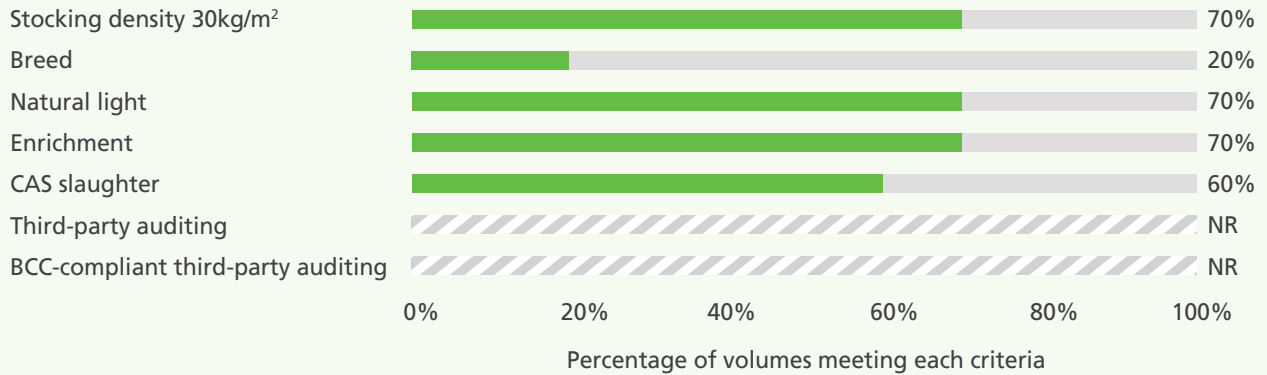
Food Service & Hospitality



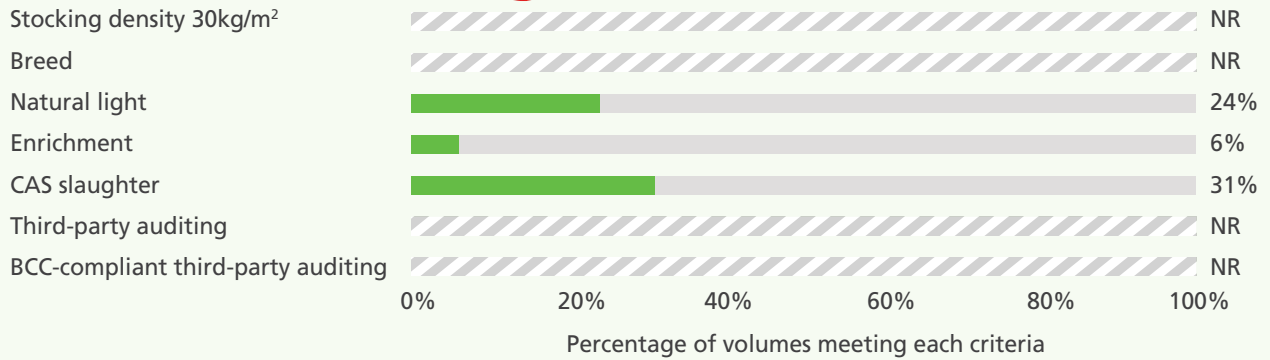
Manufacturers



Europe



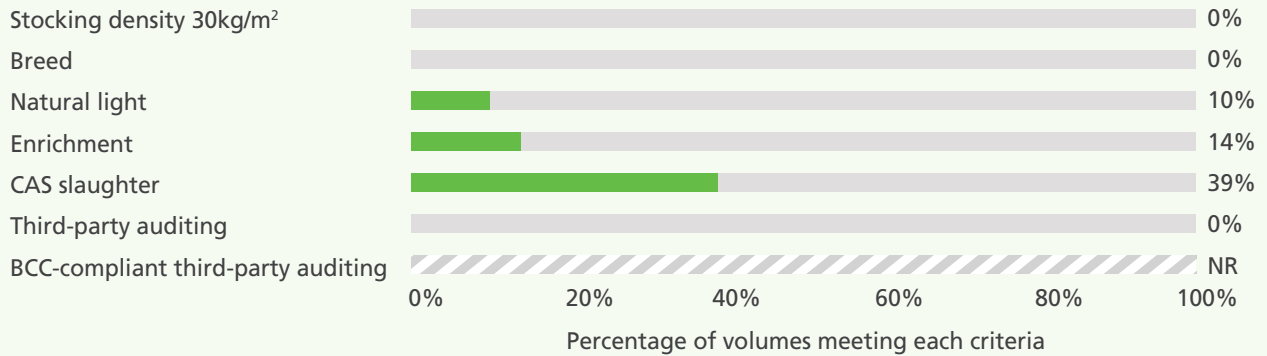
France



For stocking density, reporting is published as an average in kg/m² across all supply (40.55 kg/m²) and not by volume to the specified criteria. Compassion in World Farming encourages Fleury Michon to follow the guidelines detailed in this report in its future reporting. In France, Fleury Michon has an additional commitment to source 20% of its supply from farms where outdoor access or access to a wintergarden is guaranteed.

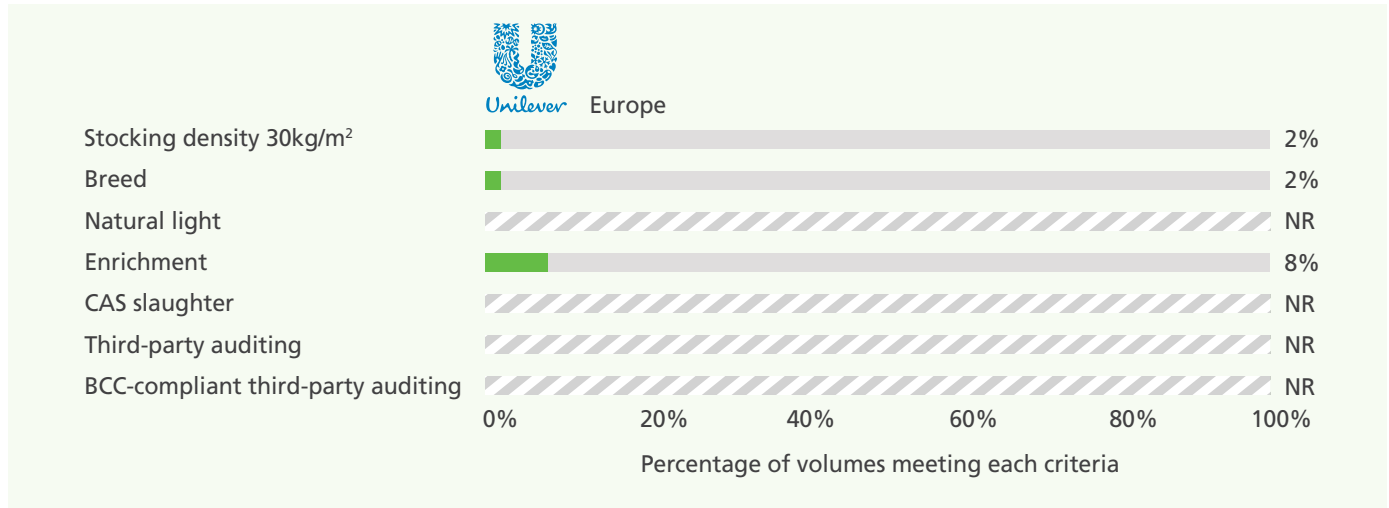


France

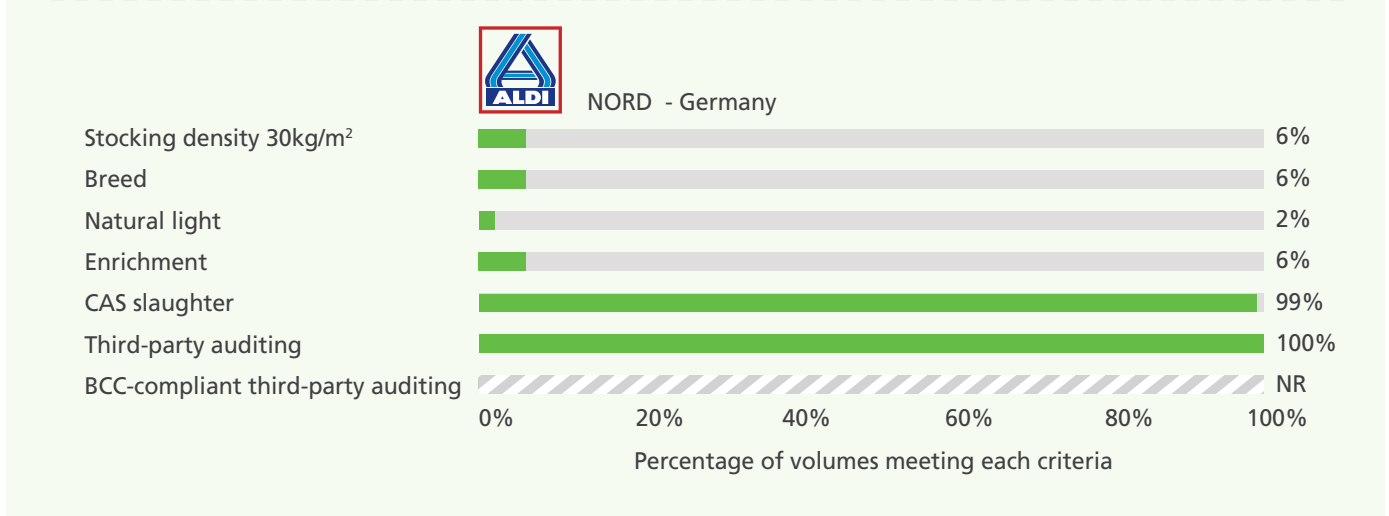
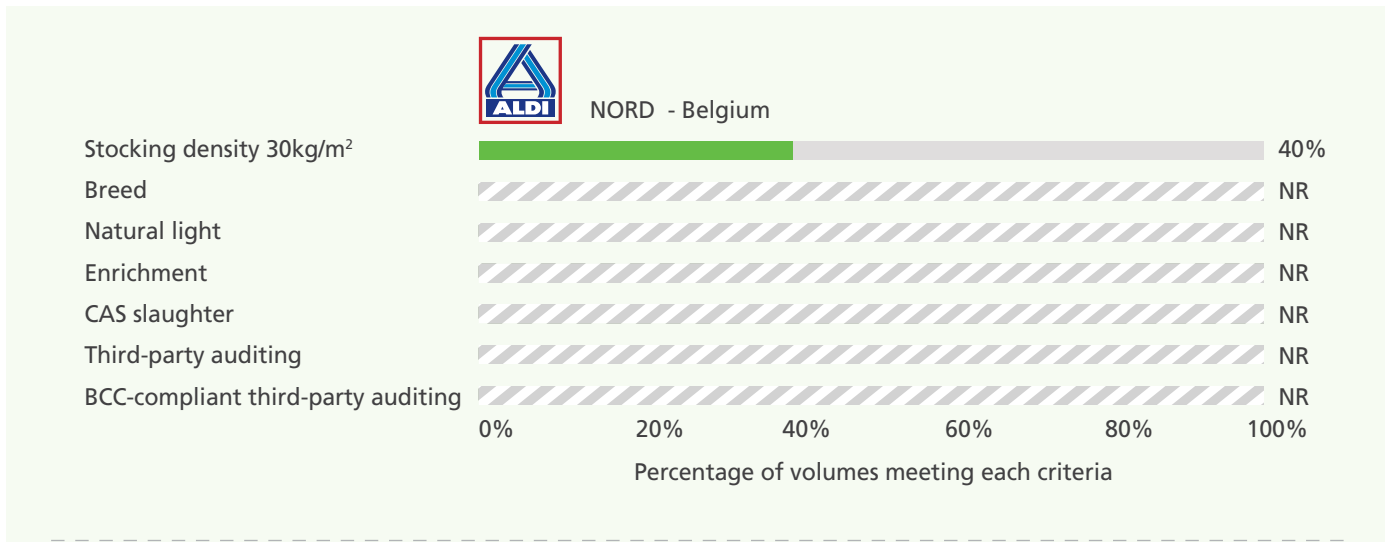


For stocking density, reporting is published as an average in kg/m² across all supply (35 kg/m²) and not by volume to the specified criteria. Compassion in World Farming encourages Sodebo to follow the guidelines detailed in this report in its future reporting.

Manufacturers - continued



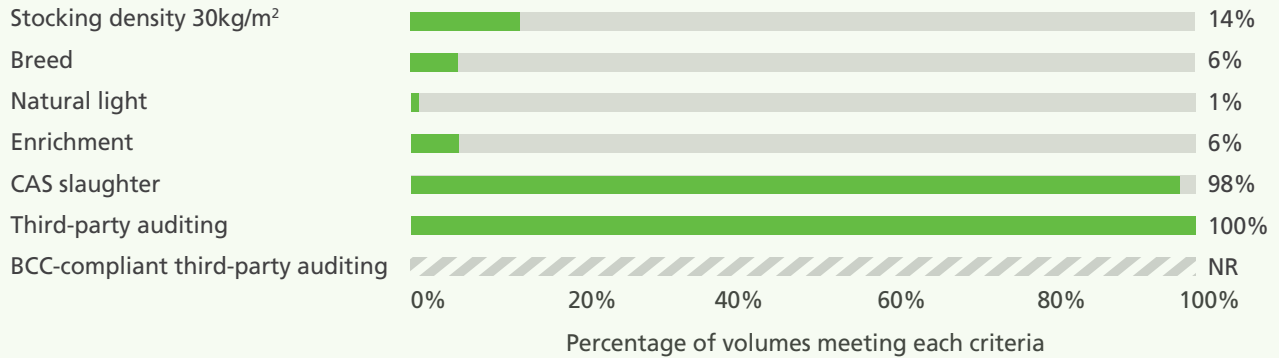
Retailers & Meal Kits



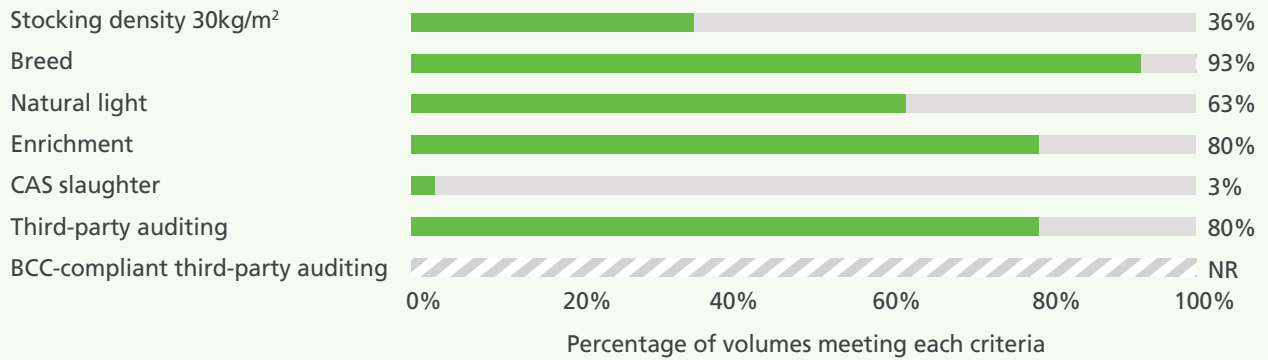
Retailers & Meal Kits - continued



SOUTH - Germany



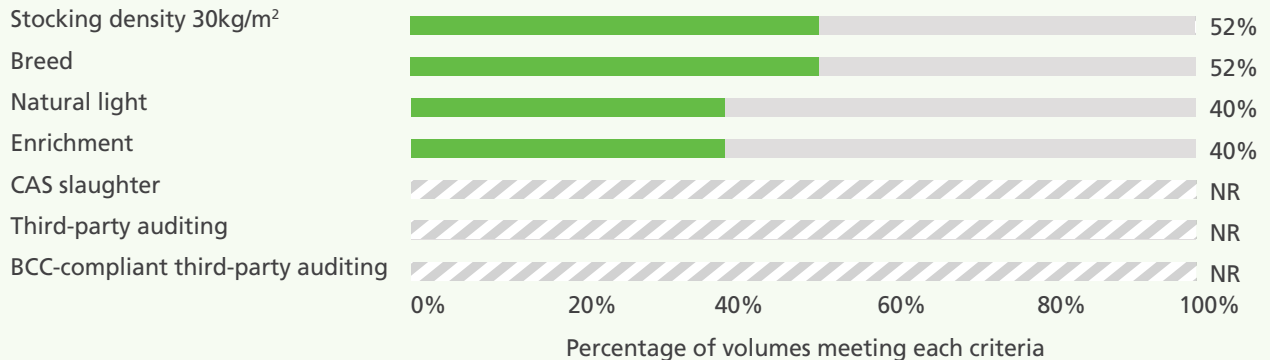
France



The reporting published by Auchan France covers fresh chicken own-brand products only. Auchan France has an additional commitment to source 20% of its supply from farms where outdoor access or access to a wintergarden is guaranteed.

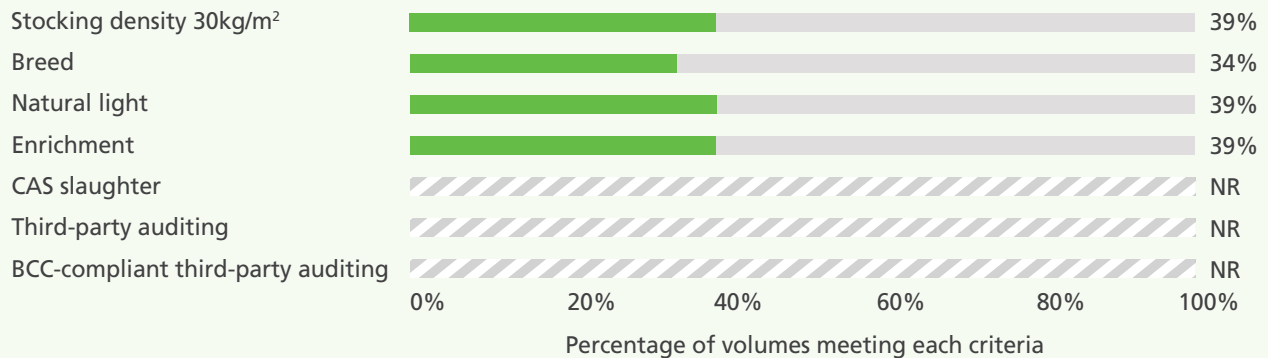


France

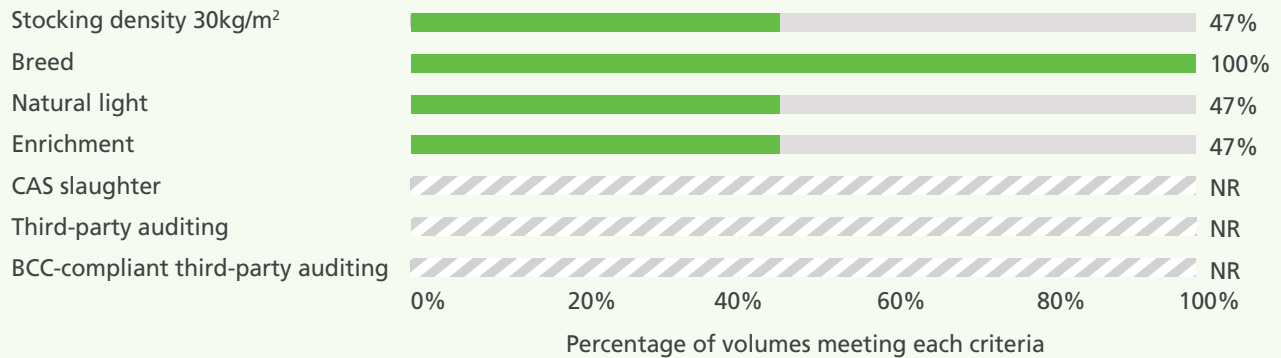


Carrefour France has an additional commitment to source 20% of its supply from farms where outdoor access or access to a wintergarden is guaranteed. Carrefour France is a member of the French Animal Welfare Label (Etiquette Bien-Être Animal) and has been selling Level C chicken products in-store since 2020, alongside Level A and B products. Carrefour France received a Good Chicken Award in 2022, the first retailer to do so under the strengthened criteria of this award.

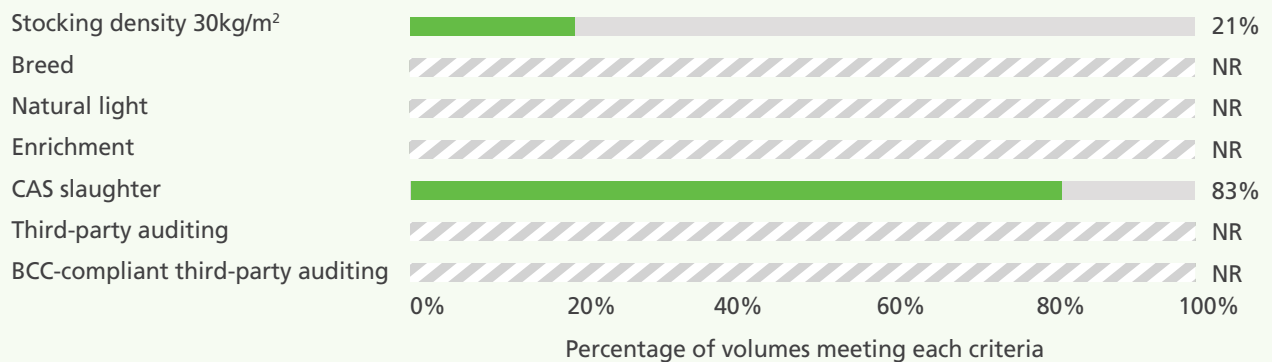
Retailers & Meal Kits - continued



E.Leclerc's reporting covers fresh products only (whole chicken, cuts, marinated cuts). E.Leclerc has an additional commitment to source 20% of its supply from farms where outdoor access or access to a wintergarden is guaranteed.



The reporting published by Groupe Casino covers only fresh chicken own-brand products in France. Groupe Casino has an additional commitment to source 20% of its supply from farms where outdoor access or access to a wintergarden is guaranteed

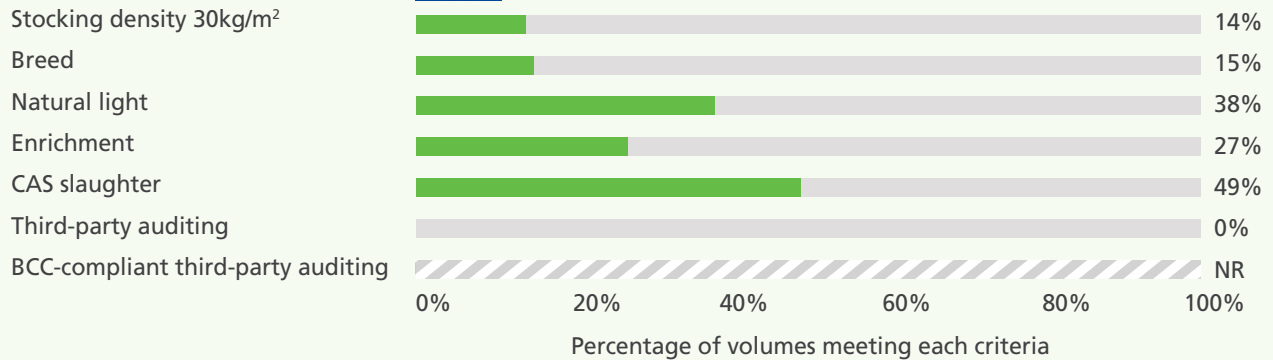


Additionally, HelloFresh reports that 21% of chicken is sourced from farms which meet or exceed the BCC, and 6 out of 12 of its European markets have access to slower-growing breeds.

Retailers & Meal Kits - continued



France

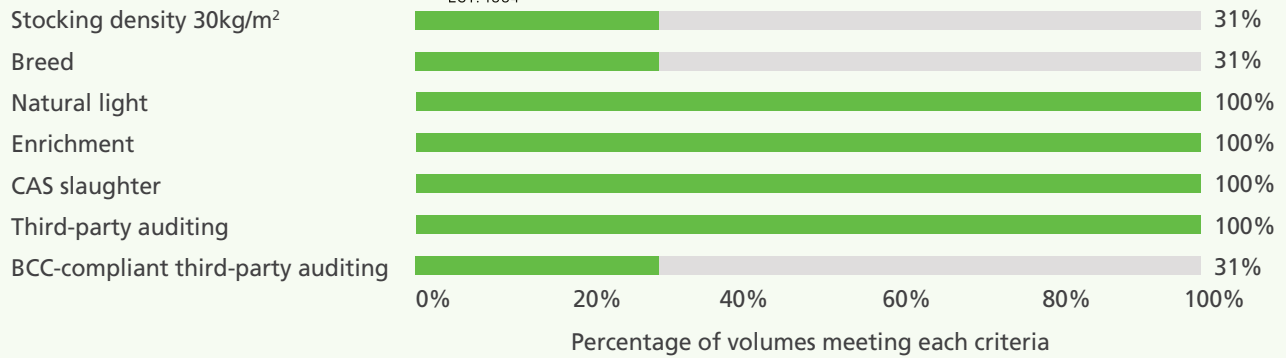


The reporting published by Lidl France covers fresh chicken only, which represents 92% of its own-brand fresh chicken range. Lidl France has an additional commitment to source 20% of its supply from farms where outdoor access or access to a wintergarden is guaranteed.



United Kingdom

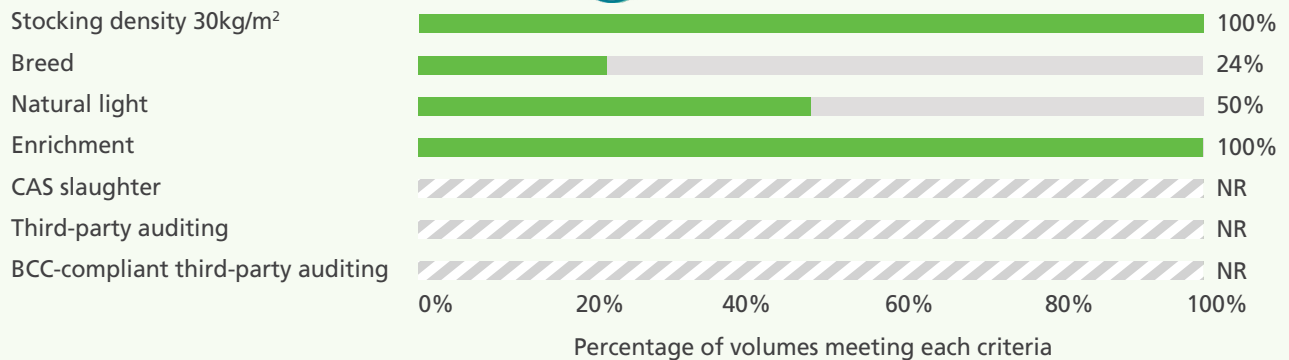
EST. 1884



As of September 2022, all of M&S's fresh chicken has been converted to the BCC, which is equivalent to 30.7% of all its chicken.

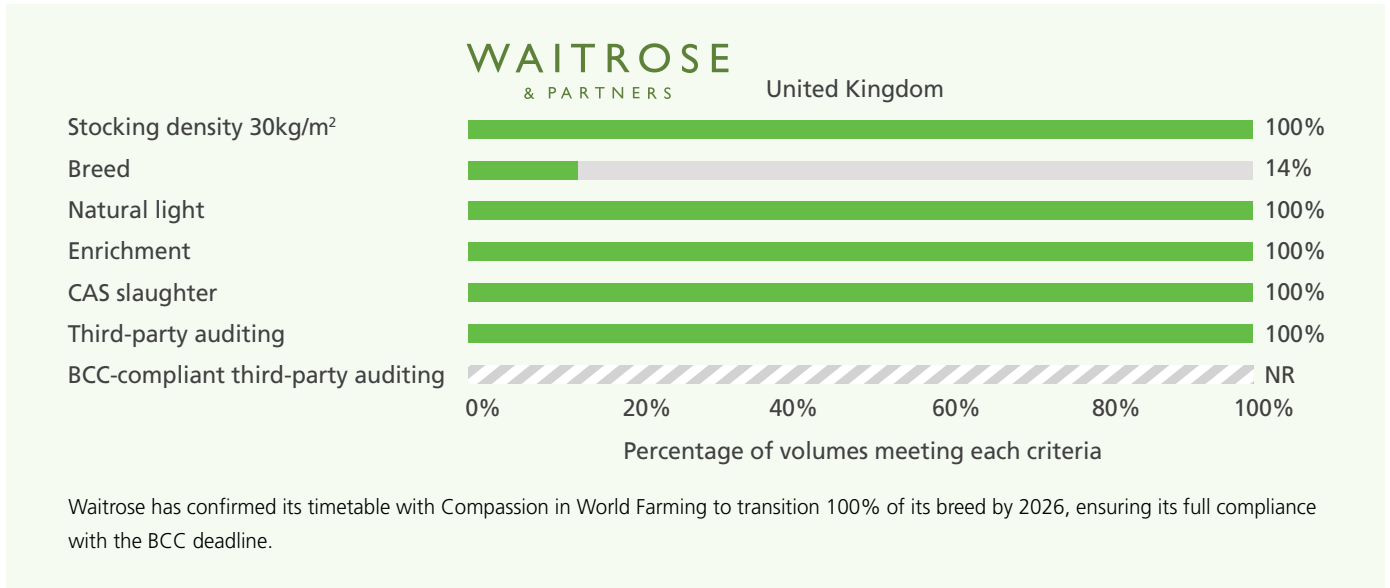


France

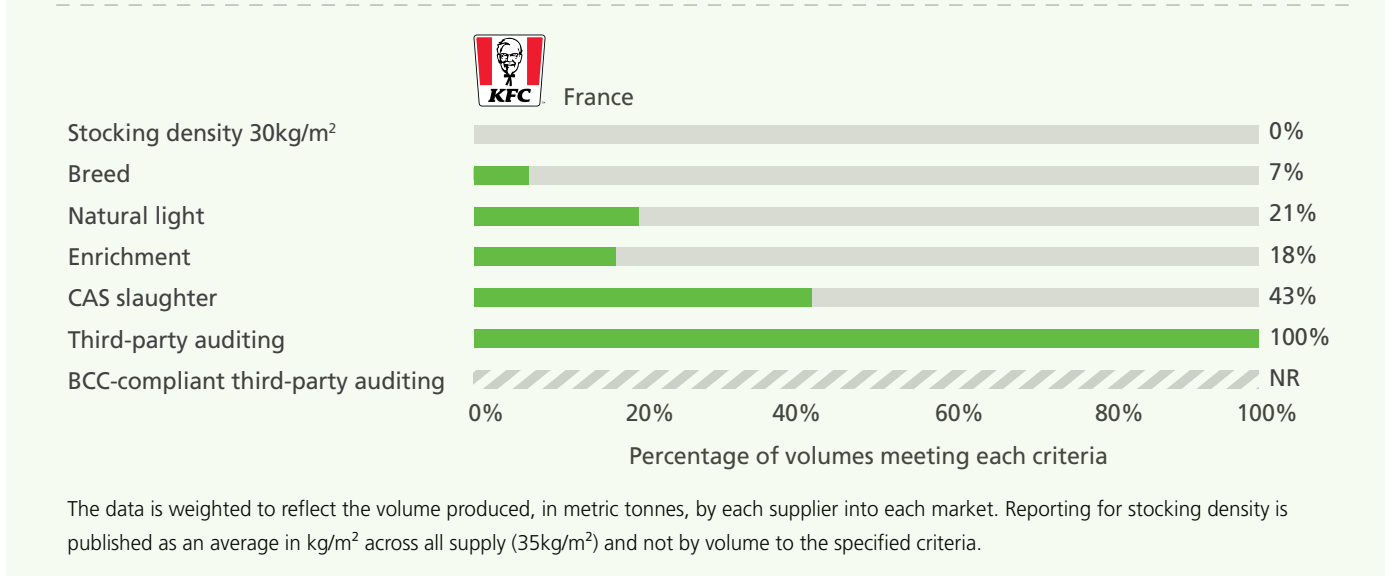
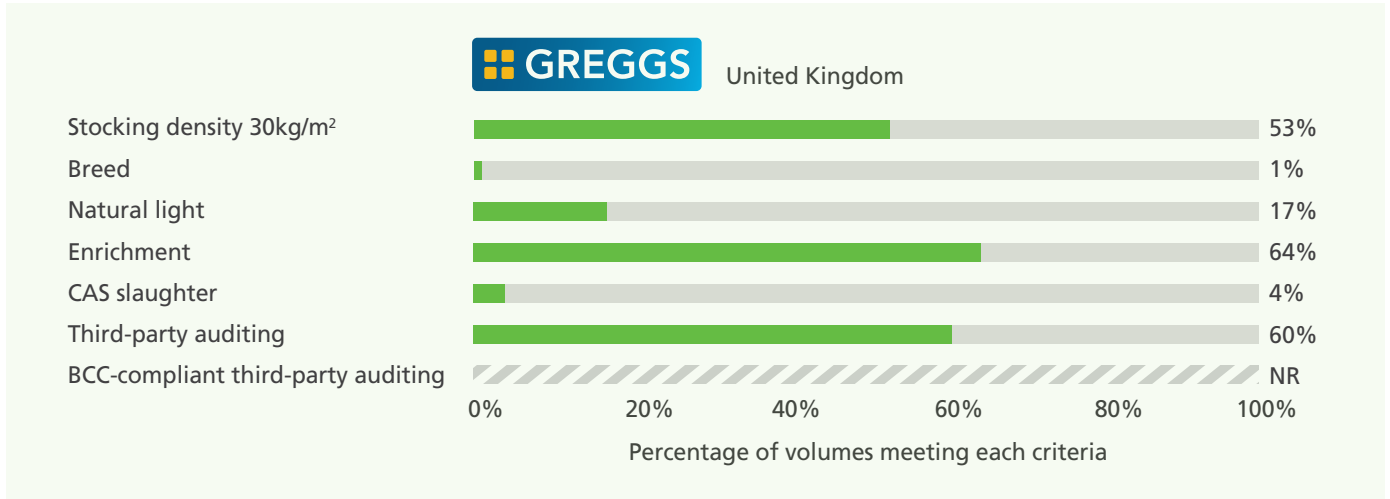


The reporting published by Système U covers fresh chicken only. Système U has an additional commitment to source 20% of its supply from farms where outdoor access or access to a wintergarden is guaranteed.

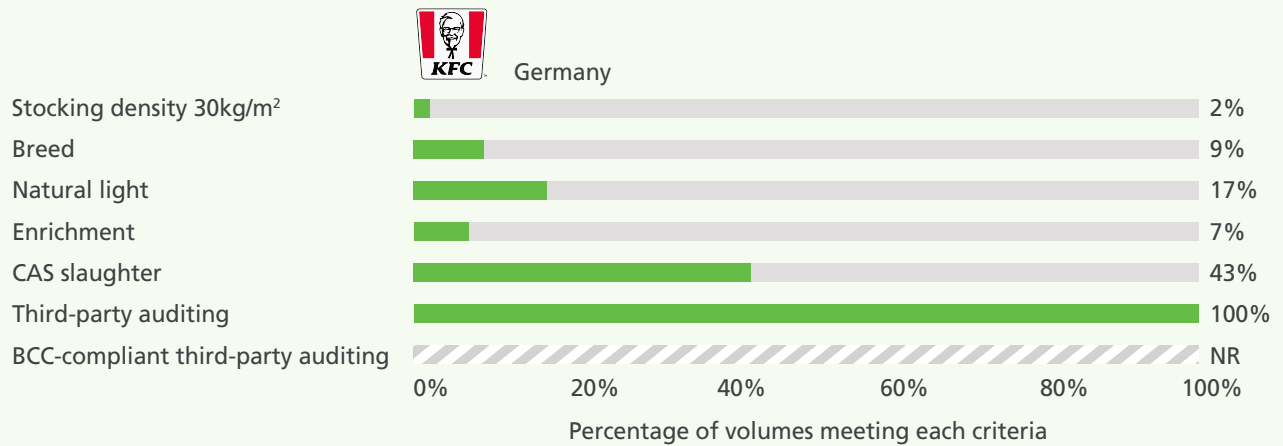
Retailers & Meal Kits - continued



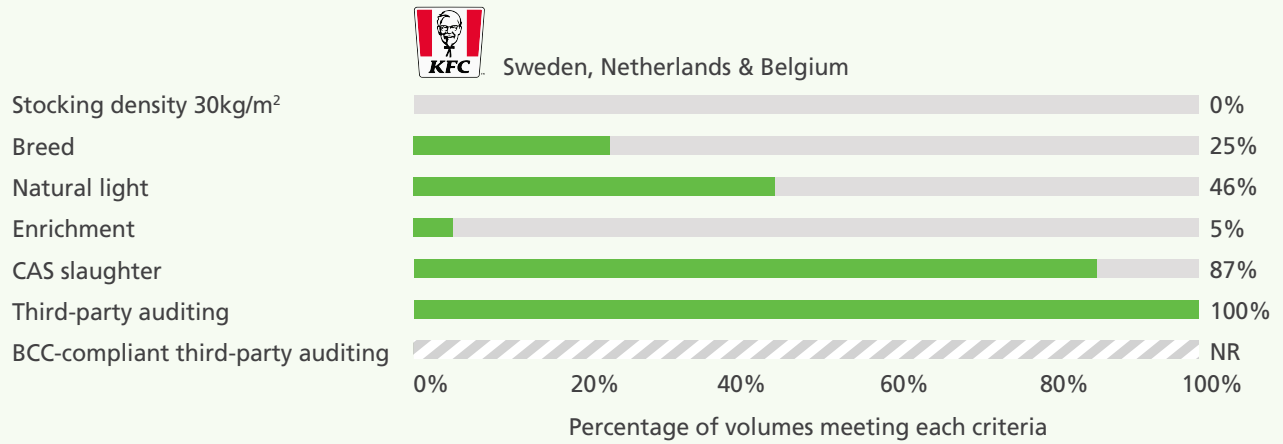
Restaurants



Restaurants - continued



The data is weighted to reflect the volume produced, in metric tonnes, by each supplier into each market. Reporting for Germany is combined with reporting across two markets which are currently not signed up to the BCC: Denmark and Switzerland. Where progress has been reported for part of the supply chain (e.g. across 95% of the supply chain), Compassion has calculated the progress to reflect a % transition based on 100% of the supply chain to ensure consistency throughout the reporting figures. This has affected CAS, natural light provision and breeds with higher welfare outcomes.

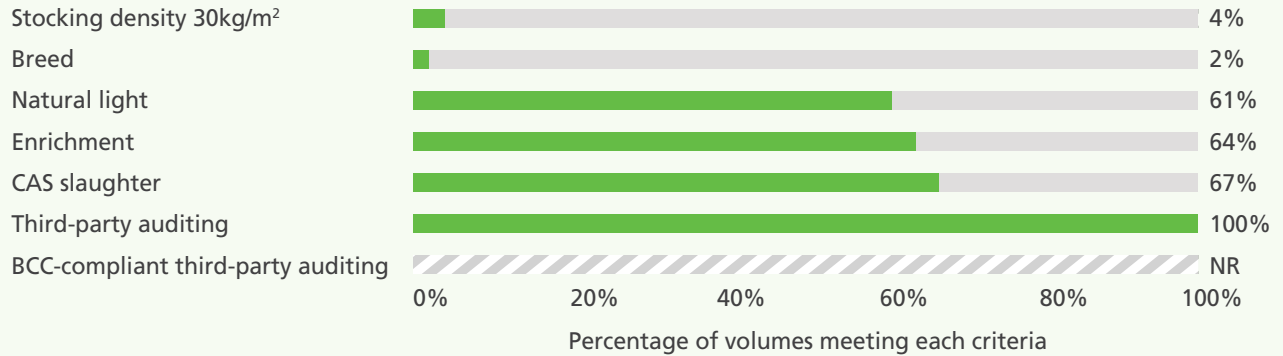


The data is weighted to reflect the volume produced, in metric tonnes, by each supplier into each market. Where progress has been reported for part of the supply chain (e.g. across 95% of the supply chain), Compassion has calculated the progress to reflect a % transition based on 100% of the supply chain to ensure consistency throughout the reporting figures. This has affected CAS reporting.

Restaurants - continued



United Kingdom & Ireland

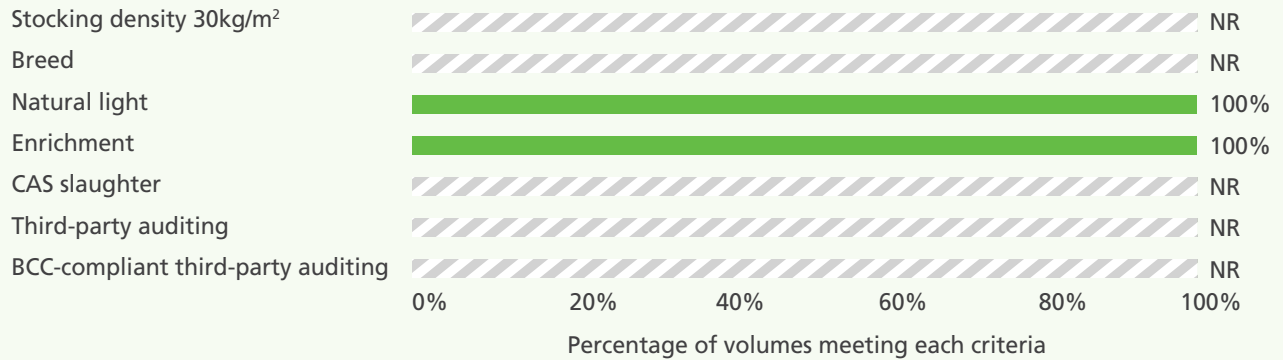


The data is weighted to reflect the volume produced, in metric tonnes, by each supplier into each market. Where progress has been reported for part of the supply chain (e.g. across 95% of the supply chain), Compassion has calculated the progress to reflect a % transition based on 100% of the supply chain to ensure consistency throughout the reporting figures. This has affected CAS reporting, natural light provision and breeds with higher welfare outcomes. In its 2022 Annual Progress Report, KFC UK & Ireland states its commitment to produce a roadmap to drive change.

For all of the markets that KFC reports progress across, data has been reported as a percentage of birds for stocking density, CAS and breed and as a percentage of houses for natural light provision and enrichment. Compassion encourages KFC to follow guidelines detailed in this report in its future reporting across all of its signatory markets.



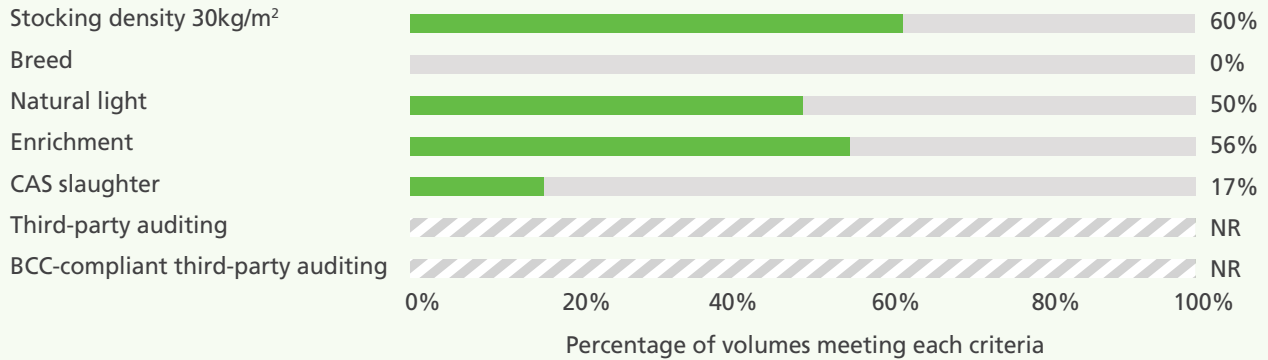
Nando's United Kingdom



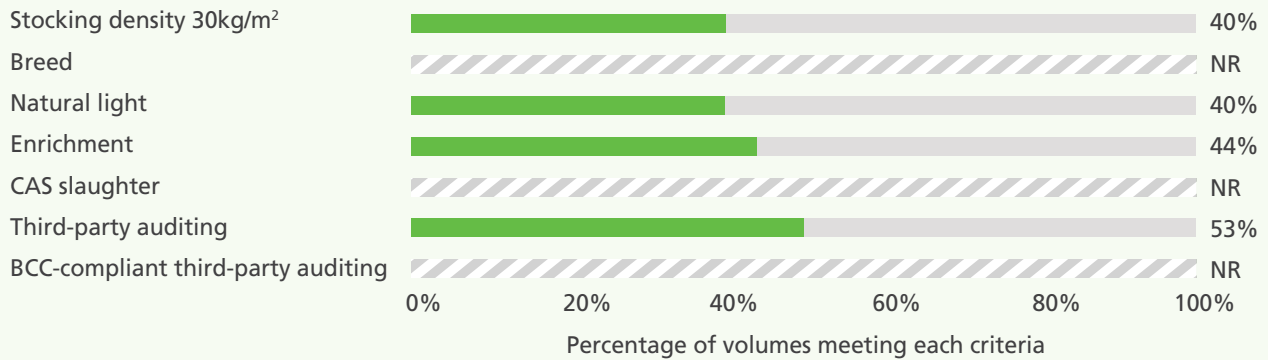
Restaurants - continued



United Kingdom



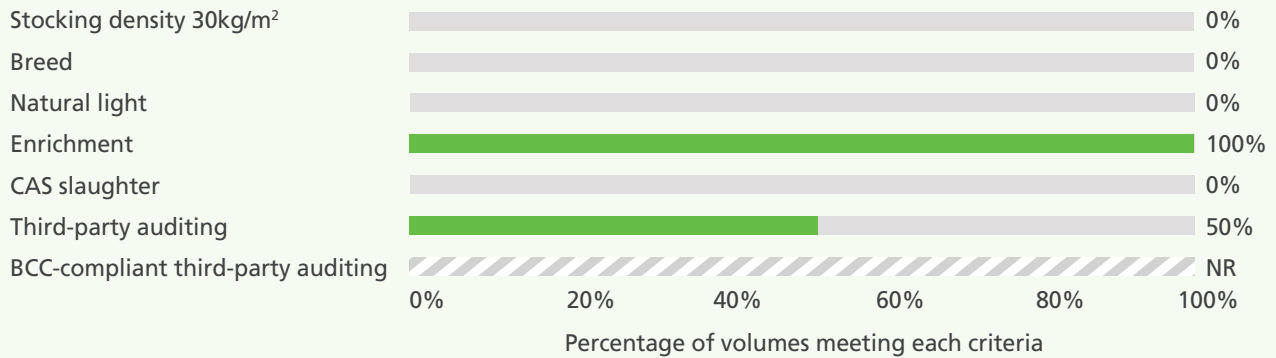
Europe



Some data is approximated. Subway reports that: stocking density is “nearly 40%”, natural light is “approximately 40%”, third-party auditing (not to BCC standards) is “nearly 50%”. On [Subway's Sustainable Sourcing webpage](#), it states its intent and commitment to produce a feasible roadmap for transition.



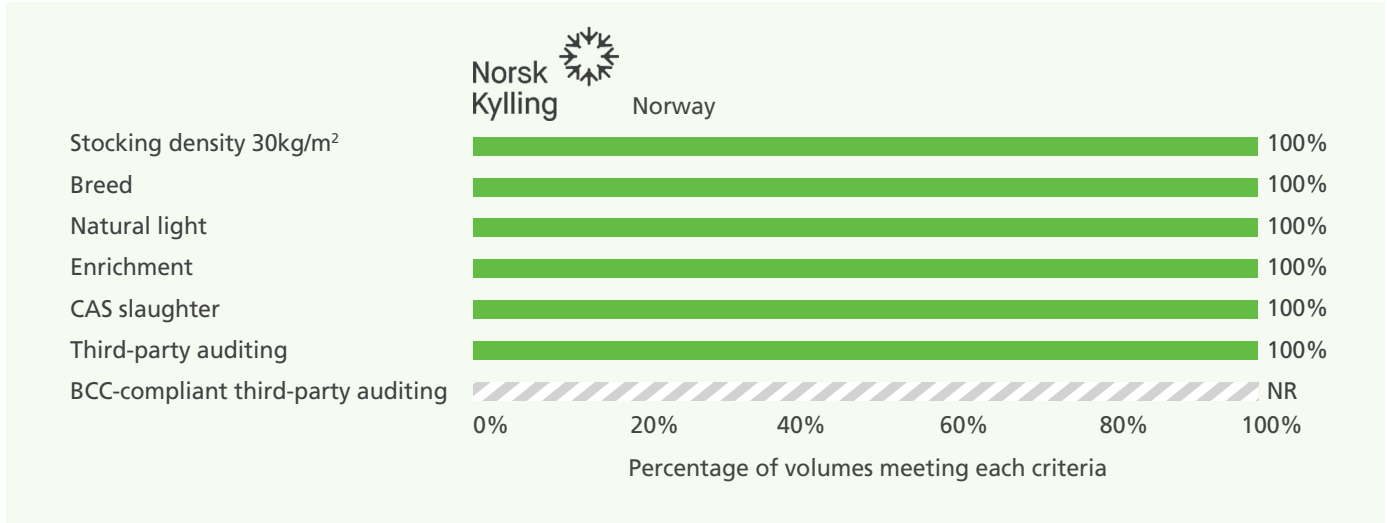
United Kingdom



Producers

Multiple producers across Europe have made a commitment to supply BCC-standard chicken to their customers.

Norsk Kylling has made a full commitment to the BCC and is reporting 100% compliance across all criteria, except for specific auditing to the BCC criteria.



Producers that have committed to supply BCC-compliant chicken:

Of the six producers with pledges to supply BCC-standard chicken, only 2 Sisters Food Group is reporting on their BCC-compliant chicken offer. As of October 2022, more than 20% of its 10.5 million chickens produced per week (more than 2 million chickens per week) meet the Better Chicken standard.



It's time to act

Having public-facing Better Chicken Commitments is an important first step for any company, however, mapping out a route to implement that change is vital and will require working with all stakeholders (both internal and external) involved in the supply chain.



To help drive the market forwards for improved broiler welfare, companies should:

- Publicly sign up to the Better Chicken Commitment – especially retailers as they have huge market influence and can tip the scales towards making higher welfare chicken the baseline standard.
- Develop a strong roadmap to phase-in the higher welfare criteria and report year-on-year progress against targets, which will be measured in our annual ChickenTrack Report.
- Work with suppliers and pace transition, capitalising on any business-to-business linkages where costs for higher welfare chicken can be shared.
- Support producers by offering longer-term supplier contracts, for stability and to encourage investment in higher welfare production.
- Consider dedicated supply/flocks to have greater control/influence over the higher welfare standards adopted.
- Apply cost mitigation strategies such as whole carcass utilisation and waste reduction strategies to enable the transition.
- Bring consumers on the journey with you through creative marketing and empower them to easily choose higher welfare products by adopting appropriate labelling to help differentiate your higher welfare products.

Looking forward

ChickenTrack provides a platform to support and encourage companies so that a successful transition to higher welfare chicken is achieved across all sectors. By setting clear targets and demonstrating progress against those targets through regular public reporting, companies can demonstrate their ownership and drive, in continually pushing for better welfare.

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 leverage industry momentum around this by working with all stakeholders in your supply chain. It is constructive for companies to establish incremental targets based on which components or supply are most easily achieved. Compassion works collaboratively with companies and has many technical resources that can help facilitate auditing your supply chain and publishing a meaningful roadmap for your transition to the BCC.

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.

It is encouraging to see the progress that is being made in this year's ChickenTrack Report and we look forward to working with companies as they strive for higher welfare across supply chains. Compassion works with companies from sign-up to having BCC-compliant product on shelf. If your company currently does not have a policy around broiler chickens or a detailed roadmap for your path toward BCC implementation, please get in touch: foodbusiness@ciwf.org



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Appendix

Better Chicken Commitment

By 2026, we will require our suppliers to meet the following requirements for 100% of the [fresh, frozen and processed] chicken in our supply chain:

1. Comply with all EU animal welfare laws and regulations, regardless of the country of production.
2. Implement a maximum stocking density of 30kg/m² or less. Thinning is discouraged and if practised must be limited to one thin per flock.
3. Adopt breeds that demonstrate higher welfare outcomes: either the following breeds, Hubbard Redbro (indoor use only); Hubbard Norfolk Black, JA757, JACY57, 787, 957 or 987, Rambler Ranger, Ranger Classic and Ranger Gold, or other breeds that meet the criteria of the RSPCA Broiler Breed Welfare Assessment Protocol.
4. Meet improved environmental standards including:
 - a. At least 50 lux of light, including natural light.
 - b. At least two metres of usable perch space and two pecking substrates, per 1,000 birds.
 - c. On air quality, the maximum requirements of Annex 2.3 of the EU broiler directive, regardless of stocking density.
 - d. No cages or multi-tier systems.
5. Adopt controlled atmospheric stunning using inert gas or multi-phase systems, or effective electrical stunning without live inversion.
6. Demonstrate compliance with the above standards via third-party auditing and annual public reporting on progress towards this commitment.



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Statement of Intent

We recognise that currently there is no system commercially available at scale which meets the needs for both an effective recoverable electrical stun and for animal welfare. As such, the Statement of Intent has been developed for those companies who have a halal requirement in their supply chains and who are therefore unable to utilise CAS (stun-kill) systems. The Statement of Intent reads as follows:

Electrical water bath stunning is the main method used globally for the slaughter of poultry. There are, however, significant animal welfare concerns with this method and in 2012 the European Food Safety Authority called for an end to its use¹⁹. Effective electric alternatives are yet to be developed. However, recognising that under halal standards, Controlled Atmosphere Systems may not be accepted as the animal must not be dead at the time of slaughter (cutting), it is a bare minimum that a stunning method which renders the animal insensible to pain, but still alive, is developed and adopted as soon as possible.

We [company name] agree to:

- Actively press our suppliers and support the latest research projects²⁰ to find alternatives to electrical water bath stunning as a matter of urgency
- Support the call for the use of water bath stunning to be banned by 2026 and new, more humane systems for the effective electric stunning of poultry without conscious inversion to be developed and commercially available by no later than 1st January 2026

¹⁹ EFSA 2012 report, pg 35

²⁰ For example, by engaging with the Effective Electrical Stunning roundtable convened by Compassion in World Farming



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2022 European Report



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in world farming

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